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# **Banner Student Records Information System**

## **Registry Office User Guide**

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**Last Revision Date:**

Jan 2015

**Revision Reason:**

See Change Control

**Create Date:**

18 July 2008

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# 1 Introduction

This document is intended for use by Registry Office staff tasked with the upkeep of student data held on the Banner Student Records Information System.

## 1.1 *Logging On*

The Banner Student system is a web based application accessed via the following URL:

<http://inb.ulster.ac.uk>

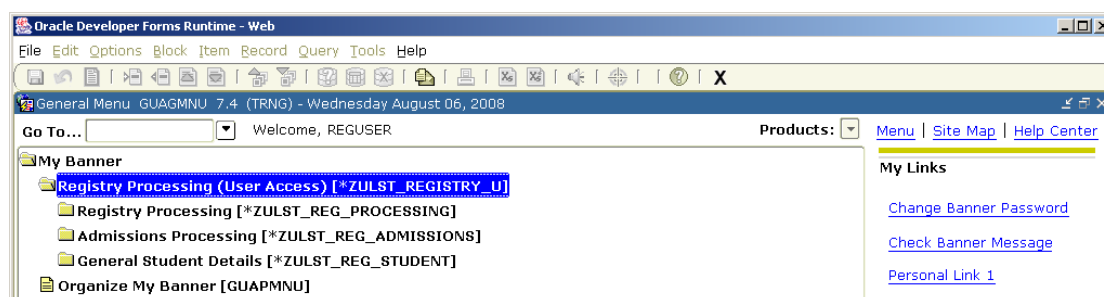
Users will have been given access to screens (or forms) appropriate to their business role within the University.

- Enter your ecode
- Enter your password
- Leave the database field blank
- Click Connect

New users are advised to use their ecode and initial password as provided by a member of the Student System Support Team when logging on. Once logged on, users are advised to use the Change Banner Password link located on the right hand side of the main menu to change their password to something more memorable (the database field may be left blank again).

Registry forms are located in various folders found within the My Banner folder.

All forms required for student record processing are located in the Registry Processing (User Access) folder. Additional finance related forms are located in the Manager Access folder.



The User Access folder divides the forms into 3 further subsections.

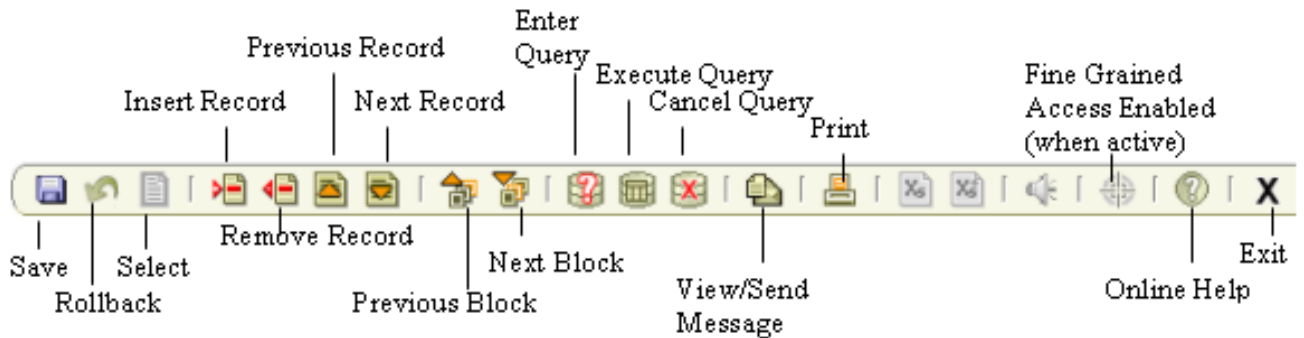
- **Registry Processing Details** – This folder contains forms that are required to perform various registration processes, for example enrolling a student, recording a withdrawal etc.
- **Admissions Processing** – This folder contains forms relevant to the admissions process (Direct and UCAS) and also Online Applications

- **General Student Details** – This contains forms related to the student personal details for example addresses, biographical information. It also contains the form required to change a students Self Service PIN.

The Manager Access folder (not pictured) contains information on Finance related forms. These forms have Query only access, so no processing is involved with these.

## 1.2 Quick Reference Guide to Banner Keyboard Commands

### Horizontal Toolbar Icons



### Keyboard Commands

[NOTE: Not all keyboard commands are available from every form.]

#### Function

Block – clear  
Block – next  
Block – previous  
Count Query Hits  
Display Oracle Error  
Exit  
Field – clear  
Field – duplicate  
Field – next  
Field – previous  
Go To another form  
LIST (List Of Values)  
Options  
Print  
Query – cancel  
Query – enter  
Query – execute  
Record – clear  
Record – duplicate  
Record – insert  
Record – next  
Record – previous  
Record – remove (delete)  
Rollback  
Save  
Select  
Show Keys

#### Keys

Shift+F5  
Ctrl+PgDn  
Ctrl+PgUp  
Shift+F2  
Shift+F1  
Ctrl+Q  
Ctrl+U  
F3  
Tab  
Shift+Tab  
F5  
F9  
Right Click or F2  
Shift+F8  
Ctrl+Q  
F7  
F8  
Shift+F4  
F4  
F6  
↓ or PgDn  
↑ or PgUp  
Shift+F6  
Shift+F7  
F10  
Shift+F3  
Ctrl+F1

## 2 The Banner ID

All applicants and students in Banner have a Banner ID. This is allocated as part of the admissions process and remains the same when the applicant

becomes a student. This ID is meant to be retained in any interaction that the person has with the institution. Therefore, if someone applies for, completes and graduates from one programme, and then several years later applies for another programme, the same ID number should be used. This is automatically facilitated by the common matching process which is included in Banner Admissions. When a new applicant record is keyed on to the system, this process searches the database for records which are a potential match for each new applicant. If such records are found, the system offers the staff member processing the application (whether from a paper form in to SKAUDIR or through the online push process) the option of either selecting one of the matching ID records or indicating that no match is present and allocating a new ID.

The Banner ID is normally located in the Key Block (top section) on the form. If the Banner ID is not available, it is possible to perform a person search to locate the record you are looking for.

### **3 Registry Specific Forms**

This section introduces the most frequently used Banner forms that are associated with Registration and the upkeep of Student Records. A detailed explanation of the functionality of each form is provided later in this document. Forms may either be navigated to via the My Banner folder structure or via the direct access key (press F5 to reveal) by entering the form acronym.

They include:

- SPAIDEN            General Person Identification
- SGASTDN        General Student Information
- SFAREGS        Student Course Registration
- SGASADD        Additional Student Information
- SOAHOLD        Hold Information
- SPACMENT       Person Comments
- SGAADVR        Multiple Advisor Information
- SHATRNS        Transfer Course Information

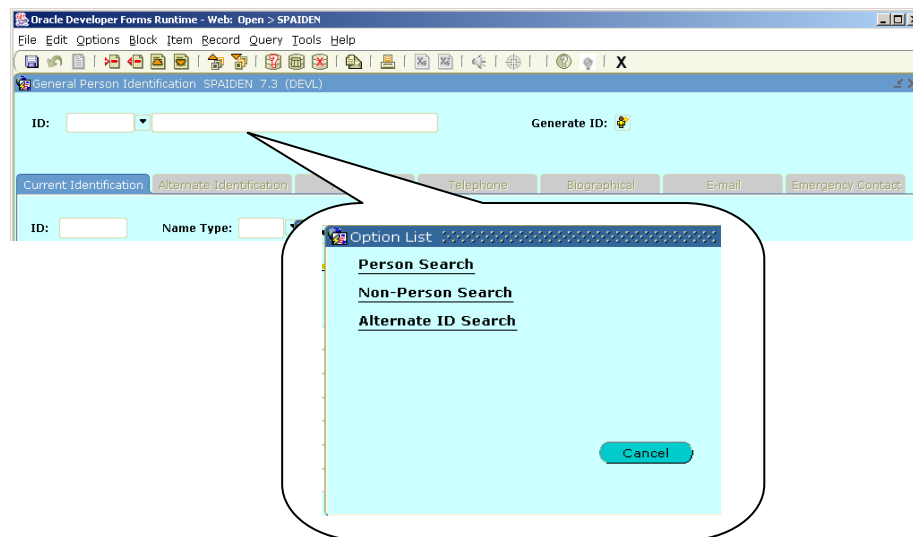
For information on Admissions forms and processes, please refer to the UCAS and Direct Admissions documentation located in the Banner Documentation and User Guide area of the Admissions, Registrations & Enrolment channel of the My Teaching tab of the University Portal.



### 3.1 Searching for a Person

Searching for a student (or person) within the Banner Student Records Information System can be performed on any form with an ID field.

If the ID number is not known, then a search may be made by clicking on the arrow beside the ID field in the key block and selecting the **Person Search** option.



Enter your search criteria into the search fields for example the name. If the date of birth is known, it may be entered as well to narrow the search. To execute the query, press F8 or click the Execute Query icon on the toolbar. A list of matching records will be displayed. In the case below, the surname Connery was entered, so the query has returned all Connery's on the system.

The screenshot shows the Oracle Developer Forms Runtime window for SPAIDEN 7.0 (DEV) displaying the search results. The table below lists the records returned by the search for the surname 'Connery'.

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type
14107103	Connery	Clara	Collette	08-JUL-1984	I	OESR
800340785	Connery	Clara	Collette	08-JUL-1984		
31465702	Connery	Gavin	Raymond	22-AUG-1983	I	OESR
800382750	Connery	Gavin	Raymond	22-AUG-1983		
800383176	Connery	Maria	Ana	24-AUG-1973		
32104801	Connery	Maria	Ana Liz	24-AUG-1973	I	OESR
800383176	Connery	Maria	Ana Liz	24-AUG-1973	N	
6139007	Connery	Michael		23-OCT-1976	I	OESR
800656966	Connery	Michael		23-OCT-1976		
800663521	Connery	Sean		12-JUN-1950		
60553103	Connery	Therese		03-OCT-1969	I	OESR
99826836	Connery	Therese		03-OCT-1969	I	OESR
800387292	Connery	Therese		03-OCT-1969		

Case Sensitive Query?  
\* No \* Yes

Identification Number, press COUNT QUERY HITS to access additional information.  
Record: 1/13 | <QSC>

When the correct record has been identified, it can be selected by double clicking on the ID number field. This will return the information to the form you were originally in.

## 3.2 SPAIDEN - General Person Identification

Menu Path: My Banner > Registry Processing > SPAIDEN

SPAIDEN is the main Person Identification form in Banner. It captures demographic and biographic information on all students within the institution. This form is used to access and update the personal information. This information will have been collected as part of the application process (UCAS or direct paper/online) and then reviewed and updated by those who become students at online enrol

Next Block

Banner ID

Additional Tabs

To use the form, enter the ID number of the person into the ID field in the Key Block. The name should automatically display. In order to populate the fields below, perform a *Next Block* by pressing ctrl and page down, or by clicking the next block icon in the toolbar.

**All of the tabs in SPAIDEN display the last date on which the information in the tab was updated and the user ID of the person who last updated it.**

The information in SPAIDEN is displayed across 7 tabs as follows

### 3.2.1 Current IdentificationTab

This tab displays the name information currently held for the person. The fields used for University of Ulster will be as follows:

- Last Name
- First Name

- Middle Name ( this will display the First Middle Name of up to 15 characters only if the person has more than one )
- Prefix
- Suffix (this field will hold Initials )
- Full Legal Name (this will display all forenames and surname. **\*\*Please Note:** This does not update automatically when other name fields are changed and therefore has to be updated separately.)

The field for Preferred First Name is not to be used.

### **3.2.2 Alternate Identification Tab**

This tab displays previous / alternative names or identities relating to the person such as a previous name by which the person was known, a Web ID for those who apply online, or their previous OES registration number for those who began their programmes prior to 2008/9. Information would not usually be directly entered or amended in this form.

### **3.2.3 Address Information Tab**

This tab shows the current address information held for a student. If more than one address is held, then the scroll bar at the side will be enabled to allow users to move between addresses. The two Address Types that will be used are:

- Correspondence/Permanent Home Address
- Term Address

### **3.2.4 Telephone Numbers Tab**

This tab displays any telephone numbers held for the student. The number will be displayed as a continuous string of characters in the **International Access field**. Any telephone number entries or amendments must always be made using this field and not the Telephone field.

### **3.2.5 Biographical Tab**

This tab displays information about the student such as gender, date of birth, marital status, religion and ethnicity.

### **3.2.6 Email Tab**

This tab displays any email address information held for the student, including any email addresses supplied during the admissions process and the University of Ulster allocated student email address.

### **3.2.7 Emergency Contact Tab**

This tab will display Next of Kin or Emergency Contact information for the student where it has been collected at Online Enrolment. More than one record can be stored. If there is more than one record, you can scroll through these using the scroll bar.

### **3.2.8 Additional Identification Tab**

New for Banner 8, this permits additional student related data to be recorded.

### 3.3 **SGASTDN - General Student**

Menu Path: My Banner > Registry Processing > SGASTDN

Anyone who becomes a student in Banner will have a *general learner* record created. This happens when new applicants are accepted in Admissions (when the final AS12 is applied). Only students will have a General Learner Record.

The general learner record is accessed in the form called **SGASTDN**. The Study Path tab will always be unavailable since we have not implemented Banner Concurrent Curricula functionality.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN - SGASTDN

File Edit Options Block Item Record Query Tools Help

General Student: SGASTDN 8.3X (DEV8)

ID: B00512444 Spence, Heather A. Student Summary Term: 200910 View Current/Active Curricula

Learner Curricula Study Path Activities Veteran Comments Academic and Graduation Status, Dual Degree Miscellaneous

**General Learner**

New Term: 200910 Academic Year 2009-2010 From Term: 200910 To Term: 999999

Student Status: AS Active

Student Type: R Returning Student (from 2006)

Residence: H Home

Fee Assessment Rate: UUST UU Internal Standard Rate

Class: 2F Year 2, FT

Full or Part Time: ☒ Full Time ☐ Part Time ☐ None

**Additional Information**

Site: BT Belfast

Session:

Block:

Citizenship:

**Curricula Summary - Primary**

Priority	Term	Program	Catalog	Student Type: Level	Campus	Rate: College	Degree
1	200910	BA Hons Business S	200910	Undergraduate	Jordanstown	Ulster Business School	Bachelor of Arts Ho
End:		Outcome Key:	3	Admission Type:	Admission:	200809	Matriculation:

**Field of Study Summary**

Priority	Term	Type	Field of Study	Department	Attached to Major
1	200910	Major	BA Hons Business Studies PT	Dept of Mark, Ent'ship & Strat	

Curricula priority number.  
Record: 1/1 <OSC>

Use tabs on this form to update or enter the following.

1. Student Status (Whether its Active or Inactive)
2. Residence Code ( H/O )
3. Study Location ( Site )
4. Learner Comments
5. Leave of Absence Information
6. Educational Goal

Information on how to do this is provided further on in the document.

To recall learner data for a student, enter the ID in the Key Block and select the academic year in the Term field. If you wish to view only the current active

curriculum record for the student, then also tick the View Current box to restrict the data retrieved and displayed. If you wish to view all curriculum records for the academic year (such as a previous programme which the student transferred from ) then leave this box blank.

If more than one record for the term exists, then the scroll bar will be enabled to allow users to move between them.

Click control and page down to perform a 'next block'

The information on this form is displayed in a set of tabs across the top of the screen in a similar way to SPAIDEN.

### 3.3.1 Learner tab

This tab displays

<b>Student Status</b>	<b>Active</b> indicates that someone is a current student. <b>Inactive</b> indicates that someone is not a current student.
<b>Student Type</b>	Indicates whether someone is a new student or a returning student.
<b>Fee Assessment Rate (Finance use only)</b>	Indicates the rate at which fees are calculated for the Rate programme being undertaken.
<b>Residence</b>	Indicates whether a student is <b>Home</b> or <b>Overseas</b> (This is used for fees purposes.)
<b>Class</b>	Indicates the year of study and the mode of attendance i.e. 2F = Year 2 and Full-time. This value is read only.
<b>Full or Part-time</b>	Indicates the mode of attendance associated with the <b>Programme</b> . Please note, the actual mode of attendance of the student may differ as they may be on placement etc.
<b>Curriculum Summary</b>	Provides a summary of information about the programme of study including programme code and title, level, campus, school and faculty.

### 3.3.2 Curricula Tab

This tab displays detailed information about the programme (curriculum/field of study). In University of Ulster terms, the curriculum and field of study will always be the same. Users are advised to make changes in programme data on SFAREGS.

### 3.3.3 Activities Tab

This tab is not currently in use.

### 3.3.4 Veteran Tab

This tab is not currently in use.

### 3.3.5 Comments Tab

This tab allows users to enter comments about the student. These may be in relation to contact that the user has had with the student which requires recording for future reference. To record a comment, select the appropriate academic year in the Term field and then enter the comments in free text in the Comments field. Then press F10 or click Save.

### 3.3.6 Academic and Graduation Status Tab

This tab displays information about a student's Academic Standing Code. This code is the Banner equivalent of the examination RPT codes in OES. (for example A12, A20 etc.)

This value is blank for all new students until the first AST code is applied at the end of Yr 1. In the second and subsequent years, the last AST code applied will remain visible on this tab until it is replaced by a new one.

*The Graduation Status and Dual Degree areas of this form are not being used at present.*

### 3.3.7 Miscellaneous Tab

The only relevant fields on this tab at present are the reason for Leave of Absence and the associated dates and the Educational Goal

#### Leave of Absence

This field displays information relating to a student's Leave of Absence. Please note that entering LOA information here **DOES NOT** automatically update the student status on the Registration tab of **SFAREGS**. If amending this field, SFAREGS must also be accessed and the status updated manually to the appropriate value. Information on how to do this is included further in the documentation.

#### Educational Goal

This is where the attainment aim of the student is held for example Master of Arts. This will be pre-populated for all students with the default attainment for their programme.

It is sometimes necessary however to amend this for example if a student does not undertake the DIS (placement) year. Values in this field are coded,

so you will need to refer to the appropriate list of values if making such changes.

### 3.4 **SFAREGS - Student Course Registration**

This form is one of the most commonly used in relation to students, as this is where the enrolment status is held and updated, and where module enrolments are viewed and entered. Programme transfers are also made using this form.

Note the Study Path and Time Status tabs will always be unavailable since the Banner Concurrent Curricula functionality has not been implemented.

**Enrollment Information**

Term: 200910 ID: B00512444 Spence, Heather A. Date: 11-APR-2011 Holds:

☐ View Current/Active Curricula ☐ Print Bill ☒ Print Schedule

Registration Student Term Curricula Study Path Time Status

Status: **RE** Registered Reason:

Process Block:  Status Date: 11-APR-2011 ☐ Delete All CRNs

Hours: Minimum: .000 Maximum: 99.990 Source:

Acceptance: ☐ Confirmed ☒ None ☐ Accepted

**Course Information**

CRN	Subject	Course	Section	Grade Mode	Credit Hours	Bill Hours	Attempted Hours	Time Status Hours	Status	Level	Appr Recd	Override	Part of Term	Instruction	Campus
10395	ARC	732	0	N	.000	.000	.000	.000	DD	UG	<input type="checkbox"/>	<input type="text"/>	S1		BT
10398	ARC	741	0	N	.000	.000	.000	.000	DD	UG	<input type="checkbox"/>	<input type="text"/>	S1		BT
18489	ARC	730	1	N	.000	.000	.000	.000	DD	UG	<input type="checkbox"/>	<input type="text"/>	S1		BT
10399	ARC	742	0	N	.000	20.000	.000	.000	EF	UG	<input type="checkbox"/>	<input type="text"/>	S2		BT
18491	ARC	740	1	N	.000	.000	.000	.000	DD	UG	<input type="checkbox"/>	<input type="text"/>	S2		BT
16986	ARC	734	0	N	10.000	10.000	.000	.000	RE	UG	<input type="checkbox"/>	<input type="text"/>	S1		BT
18393	AAD	718	1	N	40.000	40.000	.000	.000	RE	GT	<input type="checkbox"/>	<input type="text"/>	S12		BT
18837	BMS	101	0	N	20.000	20.000	.000	.000	RE	UG	<input type="checkbox"/>	<input type="text"/>	S2		CE
11183	BMS	828	1	N	30.000	30.000	.000	.000	RE	GT	<input type="checkbox"/>	<input type="text"/>	S2		CE

**Error Flag:**  **Status Type:**

Fees:  Date: 05-APR-2011 Credit Hours: 100.000 Bill Hours: 120.000 CEU Hours: .000

Enrollment Status Code; Press LIST for valid codes, CQUERY for student info.  
Record: 1/1 ... List of Valu... <OSC>

**NOTE : IF A HOLD HAS BEEN PLACED ON A STUDENT FOR FEE DEBT OR OTHER REASONS, THE SYSTEM WILL PREVENT USERS FROM ACCESSING OR AMENDING INFORMATION IN THIS FORM. IT WILL NOT BE POSSIBLE TO ENROL SUCH A STUDENT OR ENTER/AMEND THEIR MODULES. THE TYPE OF HOLD CAN BE CHECKED BY CLICKING ON THE DOWN ARROW BESIDE THE HOLD FIELD IN THE KEY BLOCK. THE STUDENT SHOULD THEN BE REFERRED TO THE APPROPRIATE DEPARTMENT.**

To access information for a student, enter (or select using the Search functions) the term and ID number in the top block. If you only wish to view curriculum information relating to the current programme, then tick the View Current/Active Curricula box. (If a student has transferred programmes, a



history of changes is held. This will be displayed on the Curricula Tab unless this box is checked.)

Perform a *Next Block*.

The information on this form is displayed on a series of tabs as in SGASTDN.

### 3.4.1 Registration Tab

The Enrolment Information section of this tab displays the current enrolment status of the student and the date on which this status was created.

All new students begin the year with a status of EL (Eligible to Register) and all normally progressing students begin the year with a status of ER (Expected to Return). After enrolment, this status is updated to RE (Registered).

Any subsequent changes to a student's status such as LOA or withdrawal are recorded here in addition to recording the information elsewhere in Banner. (There are additional statuses related to other categories of student and types of enrolment. A full list of these and an explanation of how they are to be used is provided further in the document)

The Course Information section displays the modules that a student has enrolled for and shows the following information

CRN	this is the number which identifies the section or offering of the module that the student is enrolled on. This number is term specific and will be updated on a yearly basis. It should not be confused with the module code.
Subject and Course	These identify the core module itself
Section	Within Banner, a module that is offered in two semesters or on in two campuses at the same time has one module code but two sections or CRN's. Modules which only have one section (i.e. those that are only offered once in the year anywhere) will have a Section number of 0 while those which have more than one section will have a Section number of 1, 2 etc. This value relates to the CRN that has been entered.
Status	Banner has the concept of a status for the student's enrolment on modules <b>as well</b> as their enrolment on a programme. This will be a default value from the enrolment status in most cases. Others will have to be updated manually

*Additional items of information such as grade mode, hours, level, part of term (semester ),method of instruction and campus are all held against the module/CRN are automatically populated with their default values.*

For information on adding, deleting, amending a status of a module, please refer to the How to section later in the document.

### **3.4.2 Student Term Tab**

This displays various items of information relating to the student's enrolment for the term in question. The academic standing value displayed refers to the AST applied for the academic year displayed in the Last Term Attended field.

### **3.4.3 Curricula Tab**

This tab displays information about the programme on which the student is currently enrolled. All Programme changes are managed in this form.

For information on programme changes, please refer to the 'How to' section later in the document.

### 3.5 SGASADD - Additional Student Information

This form holds additional information about students in two blocks, Student Cohort and Student Attribute. To retrieve a student's record, simply enter the Banner ID in the key block and press CTRL and Page Down, or click the Next Block icon on the toolbar.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN - SGASTDN - SFAREGS - SGASADD

File Edit Options Block Item Record Query Tools Help

Additional Student Information SGASADD 8.3 (DEV8)

ID: B00512444 Spence, Heather A. Term: 200910

**Student Cohort**

From Term: 200910 Maintenance To Term: 999999

Cohort Code	Description	Inactive	Reason
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

**Student Attribute**

From Term: 200910 Maintenance To Term: 999999

Attribute Code	Description
FT	MOA Full-time
Y2	Year 2 of Programme

Student attribute code; press LIST for valid codes.

Record: 1/2 <OSC>

#### STUDENT COHORT

The Student Cohort block will only be used by staff in the Collaborative Courses Unit to record information related to some of their programmes. It can be used to hold information on groups of students who join the same year of a programme at different times during the same academic year, in order to differentiate them for reporting purposes.

*For information on adding or amending cohort information, please refer to the How to section of the document.*

#### STUDENT ATTRIBUTE

The Student Attribute block will be populated for all students with values to indicate the study year (e.g. Yr 1) and their mode of attendance (e.g. Part-Time) of the student.

The attribute representing the program year will be in the format Y1, Y2 Y3 etc where the mode of attendance will be either PT, FT or SW (Sandwich)

If the student is repeating the year with attendance or is slow-tracking on a full-time programme, then these values will be displayed here as an additional attribute.

Attribute values will be automatically generated when the General Learner record for both new and returning students is created at the start of each academic year, and will then be maintained by Registry.

### 3.6 **SOAHOLD - Hold Information**

This form is used to enter and maintain holds on a person's record. Different types of university determined holds can be created and the effects of such holds determined such as preventing a student from registering, having an award conferred etc. Holds can be put in place to expire after a set period of time or can be set to end far in the future, but then be ended when they are no longer required. A hold which is active and prevents certain actions may be over-ridden by someone who has the authority and access to the appropriate password.

**Only senior staff will have the authority to place and release holds.**

To access information about any holds on the record of a person, enter the ID in the Key Block to display the name and then do a Next Block. If any holds are in place, they will show in the Hold Details block. If the ID is unknown , then the search facility can be used as in SPAIDEN to locate and return the correct ID number.

There are a variety of holds that could have been applied to a student's record, for example:

- Fees Hold – this would be applied and maintained by the Finance Department in respect of students who have outstanding tuition fee debts or other finance issues and are not permitted to register.
- Disciplinary Hold – this would be applied and maintained by Registry staff on receipt of information about disciplinary hearing outcomes.
- Graduation / Conferment Hold – this would be applied and maintained by Exams / Registry staff on receipt of information from Finance about tuition fee debtors who are not permitted to have awards conferred.

If a hold has been applied with a genuine end date, then it will cease to be effective once that date has been reached.

If a hold has been applied with an end date of 2099, then the hold will stay effective until further notice.

### 3.7 **SPACMNT - Person Comments**

This form is used to hold details about plagiarism offences committed by the student. This information is entered and maintained by nominated school or faculty staff and not by Student Administration.

Oracle Developer Forms Runtime - Web: Open > SPACMNT

File Edit Options Block Item Record Query Tools Help

Person Comment SPACMNT 8.2 (DEV8)

ID: B00512444 Spence, Heather A.

Comment Type: UP1 Undergrad First Offence

Originator: ARD Art & Design

Contact: WEB Self Service

Contact Date: 11-APR-2011

Appointments

From Time:

To Time:

Confidentiality

Add Date: 11-APR-2011

Activity Date: 11-APR-2011

Last Updated by: E10018436

Comments:

Module: NUR101  
Instructor: Stacey A  
Type of assignment: Report  
Date of submission: 1-DEC-2010  
Date of detection: 1-JAN-2011  
Date of Interview: 2-Jan-2011  
Interviewer: Stacey A

Narrative Comments:

FRM-40400: Transaction complete: 1 records applied and saved.

Record: 1/1 ... List of Valu... <OSC>

Please refer to the section entitled Entering Plagiarism Details of the Banner Student – General Faculty Guidelines documentation located in the Banner

Documentation & User Guide area of the Admissions, Registration & Enrolment channel on the My Teaching tab of the University Portal.

### 3.8 ***SGAADVR - Multiple Advisors***

This form displays details of the academic advisers who have been allocated to a student on a academic year basis, such as Course Director, Year Tutor, Studies Adviser etc.

**This information will be entered and maintained, if required, by faculty or school staff and not by Student Administration. There are some instructions provided on how to maintain this information in the ‘How to’ section of the document for reference.**

In order to view the information held for a student, enter their ID number and select the relevant term in the Key Block and then do Next Block.

Oracle Developer Forms Runtime - Web: Open > SGAADVR

File Edit Options Block Item Record Query Tools Help

Multiple Advisors SGAADVR 7.3.1 (DEVL)

ID: B00663521 Connery, Sean Term: 200708

Advisor Information

From Term: 200708 Maintenance To Term: 999999

ID	Advisor Type	Primary Indicator
E00028827 Adair, Alastair S.	STAD Studies Advisor	<input checked="" type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Primary Indicator: Checked for Y, Unchecked for N.

Record: 1/1 <OSC>

### 3.9 ***Course Transfer Information – SHATRNS***

This form is used to record information about exemptions that have been granted to students on the basis of either accredited prior study or APEL. This information will be supplied by academic /faculty staff and will be entered into Banner by Registry. It becomes part of the student's academic history and will be used in determining whether they have achieved the required credits for an award.

Exemption information is held in relation to the programme level. This allows different exemption records to be held for UG and PG programmes for the same person if required.

**Use of this form will only be required by Registry staff who are responsible for entering Exemption information.**

In order to view an exemption, type the Banner ID into the key block and press CTRL and Page Down or click the Next Block icon on the tool bar. If any exemptions exist, the middle and bottom block will be populated as illustrated in the example below

Oracle Developer Forms Runtime - Web: Open > SGASTDN - SFAREGS - SHATRNS

File Edit Options Block Item Record Query Tools Help

Transfer Course Information SHATRNS 7.3.3 (TRNG)

ID: B00346048 Dorman, Tonya Transfer Institution Number: 1 Attendance Period Number: 1

**Transfer Institution**

Institution: 10000 Transfer Credit Institution  
Transcript Receipt Date: 11-AUG-2008  
☐ Official

**Transfer Attendance Period**

Attendance Period: 1  
Acceptance Date: 11-AUG-2008  
Effective Term: 200809 Academic Year 2008-09  
Term Type:  
Apply to Level: UG Undergraduate  
Transfer Degree:  
Attendance Begin Date:  
Attendance End Date:

NOTE: Transfer Course detail exists. Institution code, effective term, and level code cannot be updated without deleting detail 1st.

Record: 1/1

In order to view further exemption information, e.g. the module code the student is exempt from, or the number of credits the student is exempt from, either click on options and Transfer Course Detail or perform another Next Block by clicking the next block icon.

Direct Entry Letter Generation: Open > SFAREGS - SKAUMAD - SFAREGS - SHATRNS

File Edit Options Block Item Record Query Tools Help

Transfer Course Information SHATRNS 7.3.3 (TRNG)

ID: B00346048 Dorman, Tonya Transfer Institution Number: 1 Attendance Period Number: 1

**Transfer Institution**

Institution: 10000 Transfer Credit Institution  
Transcript Receipt Date: 11-AUG-2008  
☐ Official

**Transfer Attendance Period**

Attendance Period: 1  
Acceptance Date: 11-AUG-2008  
Effective Term: 200809 Academic Year 2008-09  
Term Type:  
Apply to Level: UG Undergraduate  
Transfer Degree:  
Attendance Begin Date:  
Attendance End Date:

NOTE: Transfer Course detail exists. Institution code, effective term, and level code cannot be updated without deleting detail 1st.

Record: 1/1

The Equivalent Course Detail block provides information on the module or the amount of credit points the student is exempt from. In the following screen

shot example, this particular student is exempt from module COM 037 at level A and also 30 credit points at level 1.

Further instruction on how to apply exemptions is provided in the *How to* section of this document.

Oracle Developer Forms Runtime - Web: Open > SGASTDN - SFAREGS - SHATRNS

File Edit Options Block Item Record Query Tools Help

Transfer Course Information SHATRNS 7.3.3 (TRNG)

ID: B00346048 Dornan, Tonya Transfer Institution Number: 1

Transfer Course Detail SHATRNS 7.3.3 (TRNG)

Sequence Number: 1  
Subject:   
Course Number(s):   
Hours: 15.000 Duplicate:   
Grade:   
Title:   
Group:   
Primary:   
15 credit points at level A for COM037

Equivalent Course Detail

Sequence Number	Level	Term	Count in GPA	Subject	Course	Hours	Grade	Grading Mode	Repeat	Repeat System	Title
1	UG	200809	✓	COM	037	15.000	E	E			Application Software
1	UG	200809	✓	TCE	100	30.000	E	E			UG Transfer Credit Exemption

Course Attributes

Attribute	Description
A	Level A

Level of the exempt module

Seq.no; Enter 000 if no detail is to be stored ;spaces if system is to calc.  
Record: 1/1 <OSC>



## 4 How to:

This section provides a step by step guide on how to maintain general student details and also how to carry out procedures that are applicable to Student Administration and Registry.

### 4.1 Amend General Student Details

Navigate to the SPAIDEN from

Enter a valid Banner Id, or use the Search facility to locate the student, and Next Block.

#### 4.1.1 Amending Name Details

The screenshot shows the Oracle Developer Forms Runtime interface for the SPAIDEN application. The form is titled "General Person Identification: SPAIDEN 8.2 (DEV8)". It displays the following information:

- ID:** B00512444
- Name:** Spence, Heather A.
- Generate ID:** (button)
- Tabs:** Current Identification, Alternate Identification, Address, Telephone, Biographical, E-mail, Emergency Contact, Additional Identification.
- Person Section:**
  - Last Name: Spence
  - First Name: Heather
  - Middle Name: Ann
  - Prefix: Mrs
  - Suffix: HA
  - Preferred First Name: (empty)
  - Full Legal Name: X
- Non-Person Section:**
  - Name: (empty)
- ID and Name Source Section:**
  - Last Update:
    - User: E35033
    - Activity Date: 06-NOV-2008
    - Origin: SPAIDEN
  - Original Creation:
    - User: GWENKEROILES
    - Create Date: 16-SEP-2008

Callouts indicate the following buttons:

- Save:** A floppy disk icon in the top toolbar.
- Next Block:** A right arrow icon in the top toolbar.
- Update History:** A circular arrow icon in the bottom right corner of the form.

Click on the name you would like to change or update, and enter the amendments. Save the record by clicking the save icon, or by pressing F10. A record of the previous name is stored in the Alternate Identification tab.

**Please remember that if you are correcting spelling mistakes in the forename, middle name or surname fields that these changes MUST be made in the legal name field too.**

## 4.1.2 Amending Address Details

To amend an address, click on the address tab of SPAIDEN.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item Record-Query Tools Help

General Person Identification SPAIDEN 8.2 (DEV8)

ID: B00512444 Spence, Heather A. Generate ID: [icon]

Current Identification Alternate Identification **Address** Telephone Biographical E-mail Emergency Contact Additional Identification

From Date: 14-DEC-2010 To Date: [calendar icon]

Address Type: CO Correspondence Address

Sequence Number: 24

Street Line 1: 15 Any Road

Street Line 2: Ballyeaston

Street Line 3: [empty]

City: BALLYCLARE

State or Province: [dropdown]

ZIP or Postal Code: BT39 9SJ

County: 01 County Antrim

Nation: 099 Northern Ireland

Telephone Type: CO Correspondence phone numt

Inactivate Address [checkbox]

Source: SERV

Delivery Point: [checkbox]

Correction Digit: [empty]

Carrier Route: [empty]

Last Update

User: E10018436

Activity Date: 11-APR-2011

Phone Number [empty] Extension [dropdown]

FRM-40400: Transaction complete: 1 records applied and saved.

Record: 1/? <OSC>

If you are adding a new address of the same type e.g. another CO record, enter the *to date* for the address in order to close off the old address record. Please note that this date should be at least 1 day earlier than the *from date* of the new address record that you are intending to input. Once you have inserted the *to date*, save the record by clicking the save icon or by pressing F10.

Click on record and Insert or the Insert Record icon in order to insert the new address record.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item **Record** Query Tools Help

General Person Identification SPAIDEN 8.2 (DEV8)

ID: B00349574 Wallace, [empty] Generate ID: [icon]

Current Identification Alternate Identification **Address** Telephone Biographical E-mail Emergency Contact Additional Identification

Record menu options: Previous, Next, Scroll Up, Scroll Down, Clear, Remove, **Insert**, Duplicate, Lock

Enter the From Date, followed by the address type and the address details. Once you have finished inputting the new address, save the record by clicking the save icon or by pressing F10.

Please ensure that addresses are always entered in the correct format with the city/town, postcode where relevant and country in the correct fields.

Please note that the telephone field on this tab will always be blank and is not to be used to enter information.

### 4.1.3 Amending Telephone Details

To amend an existing phone number or to replace it with a new number of the same type (e.g. CO), click on the Telephone tab. Click into the International Access field, overwrite the old number with the new one and save.

The screenshot shows the 'Oracle Developer Forms Runtime - Web: Open > SPAIDEN' window. The 'Telephone' tab is selected. The form displays three telephone entries. The first entry has a 'Telephone Type' of 'CO' (Correspondence phon), 'International Access' of '0289012345678', and 'Activity Date' of '21-OCT-2008'. The second entry has a 'Telephone Type' of 'CO' (Correspondence Address), 'International Access' of '0123456789', and 'Activity Date' of '14-DEC-2010'. The third entry has a 'Telephone Type' of 'MO' (Mobile telephone numl), 'International Access' is blank, and 'Activity Date' of '21-OCT-2008'. Each entry has fields for 'Area Code', 'Phone Number', 'Extension', 'Sequence', and 'User'. The 'Primary' checkbox is checked for the second entry. The 'Generate ID' button is visible at the top right of the form.

To enter a new number of a different type for example TM, click into the Telephone Type field on the next blank line, select the appropriate type from the list, then enter the number (prefixed by any dialling code) in the International access field. Save the record by pressing F10 or by clicking the save icon.

### 4.1.4 Amending Gender, Date of Birth and Other Biographical Information

Click on the Biographical tab in SPAIDEN. Amend the record by clicking into the required field. Enter or select the data from the list displayed and save the change by pressing F10 or by clicking the Save icon.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 8.2 (DEV8)

ID: B00512444 Spence, Heather A. Generate ID: [icon]

Current Identification Alternate Identification Address Telephone **Biographical** E-mail Emergency Contact Additional Identification

Gender: ☒ Male ☐ Female ☐ Not Available Birth Date: 18-FEB-1970 Age: 41 SSN/SIN/TIN: Deceased Date: ☐ Confidential ☐ Deceased

Citizenship: Marital Status: 2 Married Religion: 5 Buddhist Legacy: Ethnicity: 11 White British New Ethnicity: None Confirmed Date: ☐ Ethnicity and Race Confirmed

Veteran File Number: Veteran Category: None Active Duty Separation Date: ☐ Armed Forces Service Medal Indicator ☐ Special Disabled Veteran

User: E10018436 Activity Date: 14-DEC-2010

Race	User	Activity Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Gender Record: 1/1 <OSC>

#### 4.1.5 Recording a Student as Deceased

If notification is received that someone has died, this is recorded within the Biographical tab. To do this, tick the deceased box and enter the relevant date in the Deceased Date field. Save the record by pressing F10 or by clicking the Save icon.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 8.2 (DEV8)

ID: B00512444 Spence, Heather A. Generate ID: [icon]

Current Identification Alternate Identification Address Telephone **Biographical** E-mail Emergency Contact Additional Identification

Gender: ☒ Male ☐ Female ☐ Not Available Birth Date: 18-FEB-1970 Age: 41 SSN/SIN/TIN: Deceased Date: 10-APR-2011 ☐ Confidential ☒ Deceased

Citizenship: Marital Status: 2 Married Religion: 5 Buddhist Legacy: Ethnicity: 11 White British New Ethnicity: None Confirmed Date: ☐ Ethnicity and Race Confirmed

Veteran File Number: Veteran Category: None Active Duty Separation Date: ☐ Armed Forces Service Medal Indicator ☐ Special Disabled Veteran

User: E10018436 Activity Date: 11-APR-2011

Deceased Flag

Enter a date

This will block certain further actions in relation to the record and the word DECEASED will appear above the person's name when their record is accessed in any Banner forms.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN - SFAREGS

File Edit Options Block Item Record Query Tools Help

Student Course Registration SFAREGS 8.3X (DEV8)

Deceased

Term: 200910 ID: 800512444 Spence, Heather A. Date: 11-APR-2011 Holds:

☐ View Current/Active Curricula ☐ Print Bill ☒ Print Schedule

Registration Student Term Curricula Study Path Time Status

Enrollment Information

Status:  Reason:

Process Block:  Minimum:  Maximum:

Status Date:  ☐ Delete All CRNs

Hours Source Acceptance

☐ Confirmed ☐ None ☐ Accepted

Deceased

#### 4.1.6 Maintaining Email Addresses

All students are allocated a University Email account. The University email will have the preferred email indicator checked at the point of creation. Other email addresses (for example a personal or home email) collected at the point of application will not be checked as a preferred email address. It is University policy to only communicate with students via their UU email address and this is clearly stated in the Student Handbook. For this reason:

**Staff are not permitted to uncheck the preferred email indicator against the UU email.**

**Staff are not permitted to change the content of the UU email address even if this is requested by a student. Any requests of this nature should be directed to the Help Desk for the attention of IT User Services.**

Staff should also note that email addresses collected at the point of application either via UCAS or via the University Online Application facility should be managed as outlined below:


<i>Email type</i>	<i>Usage</i>	<i>Comment</i>
UU email address	Student	Do not uncheck the preferred indicator, do not change the actual email address. Refer queries from students to the Help Desk
Home email	UCAS applicant only, individual is NOT a current student	Applicant must make the change at UCAS and we receive this electronically from UCAS. This is email type is not checked as preferred.
Personal email	Direct applicant only, individual is NOT a current student	Registry staff permitted to change the PE email on receipt of email or similar request from applicant or faculty staff.

Full detail of other email types is outside of the scope of this document.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 8.2 (DEV8)

ID: B00512444 Spence, Heather A. Generate ID: 

Current Identification Alternate Identification Address Telephone Biographical **E-mail** Emergency Contact Additional Identification

E-mail Type: IE Int email (UKBA use only)

E-mail Address: wchiza@yahoo.com

☐ Preferred ☐ Inactivate ☒ Display on Web ☐ URL

Comment: Activity Date: 23-DEC-2010 User: UUDEVL

E-mail Type: UU University of Ulster email

E-mail Address: spence-h@email.ulster.ac.uk

☒ Preferred ☐ Inactivate ☒ Display on Web ☐ URL

Comment: Activity Date: 11-APR-2011 User: E10018436

E-mail Type:

E-mail Address:

☐ Preferred ☐ Inactivate ☐ Display on Web ☐ URL

Comment: Activity Date: User:

FRM-40400: Transaction complete: 3 records applied and saved.

Record: 2/2 <OSC>

start Microsoft O... Oracle Applicati... Oracle Develop... Microsoft O... uudevl@dev8 17:18

## 4.1.7 Amending Emergency Contact Information

Emergency contact information is normally collected through online enrolment. Any amendments should be made by clicking on the Emergency Contact tab, typing over the existing record and saving. If you need to add more than 1 record click on Record and Insert on the menu.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item **Record** Query Tools Help

Previous  
Next  
Scroll Up  
Scroll Down  
Clear  
Remove  
**Insert**  
Duplicate  
Lock

General Person Identification

ID: B00512444 Spence, Generate ID: [icon]

Current Identification Alternative Identification Address Telephone Biographical E-mail **Emergency Contact** Additional Identification

Priority: 1  
Relationship: B Brother

Telephone  
Area Code Phone Number Extension

Last Name: Bloggs  
First Name: Joe  
Middle Name: [empty]

Address Type: CO Correspondence Address

Street Line 1: 23 Killykeegan  
Street Line 2: Road  
Street Line 3: ZZZ

City: Coleraine  
State or Province: [empty]  
ZIP or Postal Code: BT999  
Nation: 676 Ireland (Republic of)

Last Update  
User: WWW2\_USER  
Activity Date: 20-OCT-2008

Insert  
Record: 1/1 ... <OSC>

Use the priority field to order the contact (i.e. 1, 2, 3) and add the new emergency contact details. The scroll bar will be enabled if more than one record exists.

**In this form the phone number should be entered in the Telephone field beginning at the first space and entering the digits in a continuous string.**



### 4.1.8 Resetting a Student Self Service PIN

Navigate to the GOATPAC form.

This form is used to reset the students PIN for self service. To do this, type the Banner ID into the key block and perform a next block.

Click on the reset PIN icon. This resets the student's PIN back to their date of birth (in the format *ddmmyy*)

Oracle Developer Forms Runtime - Web: Open > GOATPAC

File Edit Options Block Item Record Query Tools Help


Third Party Access GOATPAC 8.0 (DEV8)

ID: B00512444 Mrs Heather Ann Spence, HA

Third Party Information

☐ PIN Disabled

☐ Web Access Terms Accepted

Reset PIN:  **Reset PIN**

PIN Expiration Date: 31-DEC-2013

Last Web Access Date: 07-APR-2011

Third Party ID: hspence2

LDAP User ID:

When students log into Self Service after this has been done, they will be asked to update their PIN again to a new one.

### 4.1.9 Checking or Entering SSN Information

The Student Support Number is usually received electronically and matched to the student ID. However there may be occasions when this does not happen and the SSN has to be entered by Registry so that confirmation of enrolment can be processed.

In order to check whether or not someone's SSN is recorded in the Banner system you should do the following.

Go to the form RKASSLC. Enter the Banner ID in the key block and do next Block.

Oracle Developer Forms Runtime - Web: Open > GOATPAC - RKASSLC

File Edit Options Block Item Record Query Tools Help

SLC SSAR/SSAC Form RKASSLC 8.2.1 (DEV8)

ID: B00512444 Mrs Heather Ann Spence, HA

SLC AID Year: LEA: FinAid Year: External ID: NWES12345678S

External Type: SLC SSN

SLC Information External ID Information HEBSS Data SAAS Data

External ID	ID Type	LEA	SLC Fin Aid Year	Active?	Copy SSN?
NWES12345678S	SLC SSN			Y	<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Go to the External Information tab and the SSN should display on the first line in the External ID field.

If no SSN is present, you may click into the External ID field, enter the SSN and select the ID type of SLC SSN.

Save the record.

## 4.2 Registry Processing

### 4.2.1 Enrolling a Student Manually (not through OLE)

- **QuickFlow: ENRMAN**
- **Forms: SPAIDEN, SFAREGS**

Select the Enrol a Student Manually Quickflow from the Registry Processing menu.

SPAIDEN will appear. Type the Banner ID into the key block, or search for the student using the normal search procedure. Perform a *next block* by pressing CTRL and Page Down, or clicking the next block icon on the toolbar.

The screenshot shows the 'Direct Entry Letter Generation: Open > SPAIDEN' window. The title bar includes a 'Notice screen 1 of 2' callout. The menu bar contains: File, Edit, Options, Block, Item, Record, Query, Tools, Help. The toolbar has various icons for navigation and editing. The main window displays the 'General Person Identification SPAIDEN 8.2 (UU) QuickFlow: ENRMAN: 1 of 2' form. The form has a yellow background and a blue border. At the top, there is a field for 'ID: B00512444' and a text field for 'Spence, Heather A.' with a 'Generate ID:' button. Below this is a tabbed interface with tabs: 'Current Identification' (selected), 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', 'Emergency Contact', and 'Additional Identification'. The 'Current Identification' tab shows a form with fields for 'ID: B00512444' and 'Name Type:'. Below this is a 'Person' section with fields for 'Last Name: Spence', 'First Name: Heather', 'Middle Name: Ann', 'Prefix: Mrs', 'Suffix: HA', 'Preferred First Name:', and 'Full Legal Name: x'. To the right of the 'Person' section is an 'ID and Name Source' section with a 'Last Update' section containing fields for 'User: E35033', 'Activity Date: 06-NOV-2008', and 'Origin: SPAIDEN'.

Work through each of the tabs, keying in any outstanding information that is normally collected through online enrolment. Details on how to do this can be found under Amending Personal Details.

Save the record after each change. Once you have finished populating the personal details, exit out of the form.

SFAREGS will appear automatically (If the Distribution Parameters Screen Appears, click EXIT).

Enter the required term into the Term field for example 200809. Click Ctrl and Page Down in order to perform a next block. In order to amend the status, click on the down arrow first so to view the available statuses to chose from.

Direct Entry Letter Generation: Open > SFAREGS

File Edit Options Block Item Record Query Tools Help

Student Course Registration SFAREGS 8.3X (UU) QuickFlow: ENRMAN: 2 of 2

Term: 201011 ID: B00512444 Spence, Heather A. Date: 11-APR-2011 Holds: [ ] [ ] [ ]

☐ View Current/Active Curricula ☐ Print Bill ☒ Print Schedule

Registration Student Term Curricula Study Path Time Status

**Enrollment Information**

Status: **ER** Expected to Return Reason: [ ] Process Block: [ ] Status Date: 11-APR-2011 ☐ Delete All CRNs Hours: Minimum: .000 Maximum: 99.990 Source: [ ] Acceptance: ☐ Confirmed ☒ None ☐ Accepted

Select the appropriate status from the list displayed, for example RE – Registered.  
Double click on the code to bring you back to SFAREGS.

Oracle Developer Forms Runtime - Web: Open > SFAREGS

File Edit Options Block Item Record Query Tools

Enrollment Status Query SFAREGS 7.2.0.1 (DEVL) QuickFlow: ENRMAN: 2 of 2

Term: 200809 Academic Year 2008-09

Status Code	Description	Start Date	End Date
NN	New Non-enroller	01-APR-2008	31-AUG-2009
NR	Returning Non-Enroller	01-APR-2008	31-AUG-2009
ON	OENR registration in progress	01-APR-2008	31-AUG-2009
PL	Registered on Placement	01-APR-2008	31-AUG-2009
RA	Registered Repeat Attendance	01-APR-2008	31-AUG-2009
<b>RE</b>	<b>Registered</b>	<b>01-APR-2008</b>	<b>31-AUG-2009</b>
RI	Registered for Intercalary	01-APR-2008	31-AUG-2009
RO	Registered for Award Only	01-APR-2008	31-AUG-2009

Enrollment Status Refund Rules Percentage Percentage

Alternatively, if you already know the status code, you can type this directly into the status box in SFAREGS. Save the record by pressing F10 or by clicking the Save icon.

Please note, it might be necessary to update the Fees after saving. If this is the case, set the value to 'N' and resave the record.

As no compulsory modules are pre-populated in Banner, the Course Information block should always initially be blank.

**Directions on how to enter modules are detailed under *Amending Module Information* later in the document.**

The Course Information block may remain blank if the student has no modules to be entered -e,g Research, PGCE , Award Only students .

If the programme details require amendment, please see the *Amending Programme Details* section later in the document.

## 4.2.2 Amending an Enrolment Status

If you are required to update a status, access SFAREGS. Either click into the Status field and enter the new code if known, or use drop down list to find and return the appropriate code. Save by pressing F10 or clicking the save icon. The status date will change to the date of the action.

## 4.2.3 Adding a Module to a Student's Record

Access SFAREGS and retrieve the student details by entering the Banner ID. Perform a *next block* twice to access the 3<sup>rd</sup> (Course Information) block. Click on the first or next available blank row in the Course Information block. Enter the 5 character CRN if you know the code.

**Direct Entry Letter Generation: Open > SFAREGS**

File Edit Options Block Item Record Query Tools Help

Student Course Registration SFAREGS 8.3X (UU) QuickFlow: ENRMAN: 2 of 2

Term: 200910 ID: 800341989 Johnston, Emmett Date: 11-APR-2011 Holds: ☐ ☐ ☐

☐ View Current/Active Curricula ☐ Print Bill ☒ Print Schedule

Registration Student Term Curricula Study Path Time Status

**Enrollment Information**

Status: RE Registered Reason: ☐ Process Block: ☐ Minimum: .000 Maximum: 99.990

Status Date: 11-APR-2011 ☐ Delete All CRNs

Hours Source Acceptance  
☐ Confirmed  
☒ None  
☐ Accepted

**Course Information**

CRN	Subject	Course	Section	Grade Mode	Credit Hours	Bill Hours	Attempted Hours	Time Status Hours	Status	Level	Appr Recd Override	Part of Term	Method of Instruction	Campus
12783	EGM	818	0	N	60.000	60.000			RE	GT	<input type="checkbox"/>	1		CE

Error Flag: In Progress Status Type: In Progress

Fees: N - Create collector record Date: Credit Hours: Bill Hours: CEU Hours:

\*Course has multiple grade options. Use LIST for valid choices.  
 Record: 1/1 ... List of Valu... <OSC>

The rest of the data will default in automatically. If you have several modules to enter, move to the next row and continue to enter the CRN's until all modules have been entered.

Save the records by clicking Save or by pressing F10. You may need to Save the record again to acknowledge the Fee Assessment Processed message (make sure the Fees field is set to N if this is the case). Save the record a 3<sup>rd</sup> time to complete the process.

If the CRN is not know, but the module code is known, then it is possible to search using the subject and code fields to locate the available CRN's and them continue as above. To do this click on the down arrow above the Subject Code field.



Oracle Developer Forms Runtime - Web: Open > SFAREGS - SFQSECM

File Edit Options Block Item Record Query Tools Help

Registration Section Query SFQSECM 7.3.2 (NEW) QuickFlow: ENRMAN: 2 of 2

Execute Query

CRN	Part of Term	Subject	Course	Section	Available Seats	Thu	Fri	Sat	Sun	Begin Time	End Time	Conflict
9093	S1	COM	002	0	0					0001	2359	
Link: Crosslist Group: Campus: JN Schedule: C Section Status: L Block Indicator:												
9142	S1	COM	050	0	0					0001	2359	
Link: Crosslist Group: Campus: JN Schedule: C Section Status: L Block Indicator:												
9143	S1	COM	051	0	0					0001	2359	
Link: Crosslist Group: Campus: JN Schedule: C Section Status: L Block Indicator:												

Scroll through the modules and double click on the one you require. This can be repeated as many times as necessary

#### 4.2.4 Deleting a Module From a Student's Record

In Banner, once a module has been added it cannot be removed from the list. Instead, the fact that it has been deleted is identified by a change in the module status as follows:

Module added in error at enrolment and never attended – Change status to DD

Module begun and withdrawn from after a period of time – Change status to DW

To change the module status, simply update the value in the Course Information block.

Direct Entry Letter Generation: Open > SFAREGS

File Edit Options Block Item Record Query Tools Help

Student Course Registration SFAREGS 8.3X (UU) QuickFlow: ENRMAN: 2 of 2

Term: 200910 ID: B00341989 Johnston, Emmett Date: 11-APR-2011 Holds: ☐ ☐

☐ View Current/Active Curricula ☐ Print Bill ☒ Print Schedule

Registration Student Term Curricula Study Path Time Status

Enrollment Information

Status: RE Registered Process Block: ☐ Minimum: .000 Source: ☐ Confirmed ☒ None ☐ Accepted

Reason: ☐ Status Date: 11-APR-2011 ☐ Delete All CRNs Maximum: 99.990

Course Information

CRN	Subject	Course	Section	Grade Mode	Credit Hours	Bill Hours	Attempted Hours	Time Status	Status	Level	Appr Recd	Override	Part of Term	Method of Instruction	Campus
12783	EGM	818	0	N	.000	.000	.000	.000	DD	ST					CE

Change to DD

This indicates to Finance whether or not fees are to be charged for the module.

Save any status changes as before.

## 4.2.5 Amending a Module Status

If the status of a module needs to be amended for any other reason, then the appropriate status should be entered and the change saved as before.

## 4.2.6 Amending Programme Details

- **QuickFlow: PROGCHGE**
- **Forms: SFAREGS, SGASADD, SGASTDN**

### Step 1 – Change the Program Code

If a Programme Change is required, access the PROGCHGE quickflow from the Registry Processing menu. The first form to appear is SFAREGS. Query back the student by typing in the Banner ID, and press ctrl and Page Down to move to the next block.

Click on the Curricula tab.

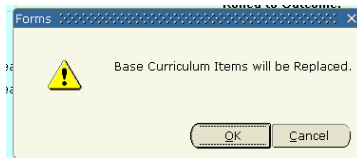
The screenshot shows the SFAREGS form with the following details:

- Term:** 200910
- ID:** 800512444
- Spence, Heather A.**
- Date:** 11-APR-2011
- Holds:** [Empty]
- Curriculum Tab:** Selected
- Curriculum Block:** Contains a table with columns: Replace, Update, Duplicate, Graduate, Roll Learner, Graduation Sequence, User ID, Activity Date, Start Date, End Date, Roll to Outcome, Rolled to Outcome.
- Field of Study:** MPhil Fine and Applied Arts FT
- Update Icon:** A circular arrow icon in the 'Update' column.
- Click here:** A callout pointing to the 'Field of Study' dropdown menu.

Banner retains all records associated with any program change. Click on the UPDATE icon in the Curriculum block.

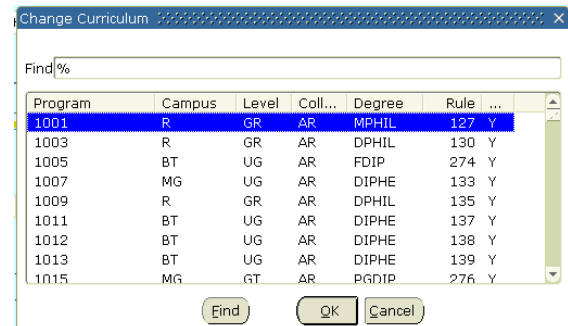
The Program Code and Field of Study are maintained in a single transaction. Click the down arrow beside the field of study on the Curriculum tab. Select Change Curriculum.





A message appears warning you that Base Curriculum Items will be Replaced, i.e. the Field of Study. Click OK.

Select the required Program Code and double click. You will notice that the Field of Study code has also been updated. Save the record.



 A screenshot of the "Direct Entry Letter Generation: Open > SFAREGS" application window. The window has a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help) and a toolbar. Below the toolbar is a status bar showing "Student Course Registration SFAREGS 8.3X (UU) QuickFlow: PROGCHGE: 1 of 3". The main area contains a form with tabs for "Registration", "Student Term", "Curricula", "Study Path", and "Time Status". The "Curricula" tab is active, showing a "Curriculum" section with various fields like "Current:", "Activity:", "Key Sequence:", "Term:", "End Term:", "Catalog Term:", "Priority:", "Program:", "Level:", "Campus:", "College:", "Degree:", "Admission Type:", "Admission Term:", "Application:", and "Matriculated Term:". There are also checkboxes for "Replace:", "Update:", and "Duplicate:". On the right side of the "Curriculum" section, there are fields for "Roll Learner:", "Roll to Outcome:", "Graduation Sequence:", "User ID:", "Activity Date:", "Start Date:", "End Date:", "Student Type:", "Site:", "Rate:", "Leave of Absence:", "Leave From Date:", "Leave To Date:", "Expected Graduation Date:", "Graduation Term:", and "Graduation Year:". At the bottom of the window, there is a status bar showing "FRM-40401: No changes to save." and "Record: 1/12".

Please refer to Appendix 1 of this document for examples of when to change the Admission Term value.

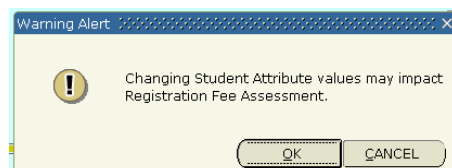
**Post Banner 8 Implementation change the programme transfers procedures to include the roll to outcome. This creates another SO degree record visible on SHADEGR and synchronises the programme code. Once the Roll to Outcome has been done, the Apply to Graduate icon is unavailable. HS 11 April 2011**

## **Step 2 – Update the Year of Program and Mode of Attendance**

Exit out of SFAREGS. You will be automatically taken to SGASADD. Perform a next block. If you do not need to update these values, Exit out of the form.

Otherwise, you will see that there are at least two attributes for the record, one stating Year of Program and one displaying the Mode of Attendance. Banner will not allow the user to overwrite these records, so in order to update them, you must delete the row and add a new one. To do this, click on the value you wish to delete. Click on the Remove Record icon.

The screenshot shows the 'Direct Entry Letter Generation: Open > SGASADD' window. The top menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The toolbar contains various icons for file operations and data management. The main window displays the 'Additional Student Information' for 'Spence, Heather A.' with ID 'B00512444' and Term '200910'. Below this, there are two main sections: 'Student Cohort' and 'Student Attribute'. The 'Student Cohort' section has a 'From Term' of '200910' and a 'To Term' of '999999'. It contains a table with columns: Cohort Code, Description, Inactive, and Reason. The 'Student Attribute' section has a 'From Term' of '200910' and a 'To Term' of '201011'. It contains a table with columns: Attribute Code and Description. The 'Attribute Code' column shows 'Y2' and 'MOA Full-time'. The 'Description' column shows 'Year 2 of Programme'. At the bottom of the window, there is a status bar with the text 'Student attribute code; press LIST for valid codes.' and 'Record: 1/2'. The Windows taskbar at the bottom shows the start button and several open applications, including 'Direct Entry Lett...' and 'Microsoft Of...'. The system clock shows '18:05'.



A warning alert will appear to tell you that Registration Fee Assessment may be affected. Click OK.

Enter the new Program Year or Mode of Attendance by typing in the desired value in the next row. Save the record by pressing F10.

### **Step 3 – Update the Site Code**

Exit out of the form. You will automatically be taken to SGASTDN. This is so you can update the Educational Goal, or Site Code, if required. If not, exit out of the Form to leave the Quickflow.

Otherwise, perform a next block. Click on the Site field under the Additional information section. To enter a new campus, simply type the new code over the new one. If you are unsure of the campus code, click the drop down arrow beside the field in order to bring up a list of values to select from.

**Direct Entry Letter Generation: Open > SGASTDN**

File Edit Options Block Item Record Query Tools Help

General Student SGASTDN 8.3X (UU) QuickFlow: PROGCHGE: 3 of 3

ID: B00512444 Spence, Heather A. Student Summary Term: 200910 View Current/Active Curricula

Learner Curricula Study Path Activities Veteran Comments Academic and Graduation Status, Dual Degree Miscellaneous

**General Learner**

New Term: 200910 Academic Year 2009-2010 From Term: 200910 To Term: 201011

Student Status: AS Active

Student Type: R Returning Student (from 2006)

Residence: H Home

Fee Assessment Rate: UUST UU Internal Standard Rate

Class: 2F Year 2, FT

Full or Part Time: ☐ Full Time ☐ Part Time ☒ None

**Additional Information**

Site: BT Belfast

Session:

Block:

Citizenship:

**Curricula Summary - Primary**

Priority	Term	Program	Catalog	Student Type: Level	Campus	Rate: College	Degree
1	200910	BA Hons Business S	200910	Undergraduate	Jordanstown	Ulster Business School	Bachelor of Arts Ho

End: 201011 Outcome Key: Admission Type: Admission: 200809 Matriculation:

**Field of Study Summary**

Priority	Term	Type	Field of Study	Department	Attached to Major
1	200910	Major	BA Hons Business Studies PT	Dept of Mark, Ent'ship & Strat	

Curricula priority number.

Record: 1/1 <OSC>

Once you have changed the Site code, save the record.

**Direct Entry Letter Generation: Open > SGASTDN**

File Edit Options Block Item Record Query Tools Help

General Student SGASTDN 8.3X (UU) QuickFlow: PROGCHGE: 3 of 3

ID: B00512444 Spence, Heather A. Student Summary Term: 200910 View Current/Active Curricula

Learner Curricula Study Path Activities Veteran Comments Academic and Graduation Status, Dual Degree Miscellaneous

**Save**

New Term: 200910 Academic Year 2009-2010 From Term: 200910 To Term: 201011

Student Status: AS Active Student Type: R Returning Student (from 2006) Additional Information

Residence: H Home Site: Jordanstown

Fee Assessment Rate: UUST UU Internal Standard Rate Session: Block: Citizenship: Search

Class: 2F Year 2, FT

Full or Part Time: Full Time Part Time None

## Step 4 – Update the Educational Goal

Click on the Miscellaneous tab on SGASTDN. To update the educational goal, simply click into the Educational Goal field and select a new value from the drop down list. Save the new value by clicking the save icon or by pressing F10.

**Direct Entry Letter Generation: Open > SGASTDN**

File Edit Options Block Item Record Query Tools Help

General Student SGASTDN 8.3X (UU) QuickFlow: PROGCHGE: 3 of 3

ID: B00512444 Spence, Heather A. Student Summary Term: 200910 View Current/Active Curricula

Learner Curricula Study Path Activities Veteran Comments Academic and Graduation Status, Dual Degree Miscellaneous

**Miscellaneous Information**

Orientation Session: Career Plan: Practical Training: Education Level: Income Range: Employment Expectation: Apprenticeship Code: Leave of Absence:

Employee and Training Code: Vocational Education: Transfer Center: Educational Goal: G8 BAH Basic Skills: Graduate Credit Approved

From Date: To Date:

**Ed Goal**

Student Basic Skills Code; press LIST for valid values.

Record: 1/? List of Valu... <OSC>

## 4.2.7 Amending a Programme Year

- Forms: SFAREGS, SGASADD

You can amend a Program Year for a student by accessing the SGASADD form directly. To do this, you can query back the student in SFAREGS, click on options and select Student Attributes and Cohorts. Alternatively, you can access SGASADD directly by typing the form name in the Go To field. If you do this, please ensure the Banner ID and the Term codes are correct.

**Direct Entry Letter Generation: Open > SFAREGS**

File Edit **Options** Block Item Record Query Tools Help

**Options Menu:**

- Detailed Student Information [SGASTDN]
- Update Students Term Information
- Student Withdrawal Information [SFIWDRL]
- Update Curriculum
- Student Attributes and Cohorts [SGASADD]**
- View Students Schedule of Classes [SFAREGQ]
- Test Score Information [SQATEST]
- Charge Optional Registration Fees [SFAEFEE]
- Review Account Detail [TSAAREV]
- Review Students Classes and Charges [SFAREGF]
- Graduation Application [SHAGAPP]
- Degrees and Awards [SHADEGR]
- Summary Student Information [SGASTDQ]
- Person System Identification [GUASYST]
- Admissions Application Detail [SAAADMS]
- Define Time Status Rules [SFATMST]
- View Registration Messages

**Student Information:**

Student: [Blank] Date: 11-APR-2011 Holds: [Blank]

**Process Block:** [Blank] Minimum: .000 Maximum: 99.990

**Acceptance:** ☐ Confirmed ☒ None ☐ Accepted

CRN	Term	Class	Hours	Status	Level	Appr	Recd	Override	Part of	Method of	Campus
10395	ARC	732	0	N	.000	.000	.000	.000	DD	UG	BT
10398	ARC	741	0	N	.000	.000	.000	.000	DD	UG	BT
18489	ARC	730	1	N	.000	.000	.000	.000	DD	UG	BT
10399	ARC	742	0	N	.000	20.000	.000	.000	EF	UG	BT
18491	ARC	740	1	N	.000	.000	.000	.000	DD	UG	BT
16986	ARC	734	0	N	10.000	10.000	.000	.000	RE	UG	BT
18393	AAD	718	1	N	40.000	40.000	.000	.000	RE	GT	BT
18837	BMS	101	0	N	20.000	20.000	.000	.000	RE	UG	CE
11183	BMS	828	1	N	30.000	30.000	.000	.000	RE	GT	CE

**Error Flag:** [Blank] **Status Type:** [Blank]

**Fees:** N - Create collector record **Date:** 05-APR-2011 **Credit Hours:** 100.000 **Bill Hours:** 120.000 **CEU Hours:** .000

Enrollment Status Code; Press LIST for valid codes, CQUERY for student info.  
Record: 1/1 | ... | List of Valu... | <OSC>

Direct Entry Letter Generation: Open > SFAREGS - SGASADD

File Edit Options Block Item Record Query Tools Help

Additional Student Information SGASADD 8.3 (UU)

ID: B00512444 Spence, Heather A. Term: 200910

**Student Cohort**

From Term: 200910 Maintenance To Term: 999999

Cohort Code	Description	Inactive	Reason
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

**Student Attribute**

From Term: 200910 Maintenance To Term: 201011

Attribute Code	Description
FT	MOA Full-time
Y2	Year 2 of Programme

Student attribute code; press LIST for valid codes.

Record: 2/2 <OSC>

Perform a next block. You will see that there are at least two attributes for the record, one stating Year of Program and one displaying the Mode of Attendance. Banner will not allow the user to overwrite these records, so in order to update them, you must delete the row and add a new one. To do this, click on the value you wish to delete. Click on the Remove Record icon.

Direct Entry Letter Generation: Open > SFAREGS - SGASADD

File Edit Options Block Item Record Query Tools Help

Additional Student Information SGASADD 8.3 (UU)

ID: B00512444 Spence, Heather A. Term: 200910

**Student Cohort**

From Term: 200910 Maintenance To Term: 999999

Cohort Code	Description	Inactive	Reason
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

**Student Attribute**

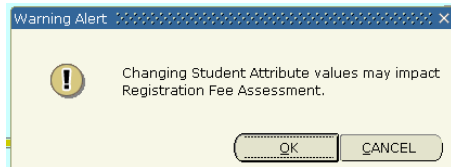
From Term: 200910 Maintenance To Term: 201011

Attribute Code	Description
FT	MOA Full-time
Y2	Year 2 of Programme

Student attribute code; press LIST for valid codes.

Record: 2/2 <OSC>

**Remove Record**



A warning alert will appear to tell you that Registration Fee Assessment may be affected. Click OK.

Enter the new Program Year or Mode of Attendance by typing in the desired value in the next row. Save the record by pressing F10.

## 4.2.8 Amending a Mode Attendance

### ○ Forms: SFAREGS, SGASADD

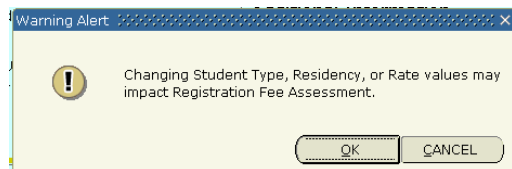
Please see Amending a Program Year. This time change the Mode of Attendance (PT, FT, SW etc)

## 4.2.9 Amending a Residence Code

### ○ Forms: SGASTDN

Access the form SGASTDN. Query back the student and perform a next block. Click into the Residence field and simply select the correct new code from the drop down, or type it in directly.

A screenshot of the "Direct Entry Letter Generation: Open > SGASTDN" application window. The window has a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help) and a toolbar. Below the toolbar, there's a header area with fields for "ID:" (B00512444), "Spence, Heather A.", "Student Summary" (dropdown), "Term:" (200910), and a checkbox for "View Current/Active Curricula". Below this is a tabbed interface with tabs: "Learner", "Curricula", "Study Path", "Activities", "Veteran", "Comments", "Academic and Graduation Status, Dual Degree", and "Miscellaneous". The "Learner" tab is active, showing the "General Learner" section. This section contains several fields: "New Term:" (200910), "Academic Year 2009-2010", "Student Status:" (AS), "Active", "Student Type:" (R), "Returning Student (from 2006)", "Residence:" (Home), "Fee Assessment Rate:" (UUST), "UU Internal Standard Rate", "Class:" (1F), "Year 1, FT", "Full or Part Time:" (radio buttons for Full Time, Part Time, None). To the right of these fields is an "Additional Information" section with fields for "Site:" (JN), "Jordanstown", "Session:" (dropdown), "Block:" (dropdown), and "Citizenship:" (checkbox). A callout box with the label "Residence" points to the "Residence:" dropdown menu. At the bottom of the window, there's a summary table with columns: "Term", "Program", "Catalog", "Student Type: Level", "Campus", "Rate: College", and "Degree".



A message will appear warning you that by changing this value, Registration Fee Assessment may be affected. Click on OK.

Save the record by pressing F10, or by clicking the Save icon on the toolbar.

## 4.2.10 Amending a Site Code

### Forms: SGASTDN

Access SGASTDN. Query back the student and perform a next block. Click on the Site field under the Additional information section. To enter a new campus, simply type the new code over the new one. If you are unsure of the campus code, click the drop down arrow beside the field in order to bring up a list of values to select from.

Once you have changed the Site code, save the record.

## 4.2.11 Amending an Educational Goal

### Forms: SGASTDN

Access SGASTDN and click on the miscellaneous tab. To update the educational goal, simply click into the Educational Goal field and select a new



value from the drop down list. Save the new value by clicking the save icon or by pressing F10.

The screenshot shows the 'Direct Entry Letter Generation: Open > SGASTDN' window. The title bar includes standard window controls. The menu bar contains: File, Edit, Options, Block, Item, Record, Query, Tools, Help. The toolbar has various icons for file operations and navigation. The main area displays 'General Student SGASTDN 8.3X (UU)'. Below this, there's a header section with 'ID: B00512444', 'Spence, Heather A.', 'Student Summary' dropdown, 'Term: 200910', and a 'View Current/Active Curricula' checkbox. A tabbed interface at the bottom includes: Learner, Curricula, Study Path, Activities, Veteran, Comments, Academic and Graduation Status, Dual Degree, and Miscellaneous (selected). The 'Miscellaneous Information' section contains two columns of fields. The left column includes: Orientation Session (checkbox), Career Plan (dropdown), Practical Training (checkbox), Education Level (dropdown), Income Range (checkbox), Employment Expectation (checkbox), Apprenticeship Code (checkbox), and Leave of Absence (checkbox). The right column includes: Employee and Training Code (checkbox), Vocational Education (checkbox), Transfer Center (checkbox), Educational Goal (dropdown with 'G8' selected and 'BAH' as an option), Basic Skills (checkbox), and a 'Graduate Credit Approved' checkbox. At the bottom right, there are 'From Date' and 'To Date' fields with calendar icons.

#### 4.2.12 Recording a Leave of Absence

- **QuickFlow: RECLOA**
- **Forms: SGASTDN, SFAREGS**

Select the Record a Leave of Absence QuickFlow from the Registry Processing Menu.

##### **Step 1 - Record the Leave of Absence Reason and the *From* and *To* Dates**

The first form the QuickFlow directs you to is SGASTDN. Query back the student by entering the Banner ID and by entering the appropriate term. Tick the view active/current curricula check box if required. Perform a *next block*.

Click on the Miscellaneous tab.

Direct Entry Letter Generation: Open > SGASTDN

File Edit Options Block Item Record Query Tools Help

General Student SGASTDN 8.3X (UU) QuickFlow: RECLOA: 1 of 2

ID: B00512444 Spence, Heather A. Student Summary Term: 200910 View Current/Active Curricula

Learner Curricula Study Path Activities Veteran Comments Academic and Graduation Status, Dual Degree Miscellaneous

Miscellaneous Information

Orientation Session: ☐ Career Plan: ☐ Practical Training: ☐ Education Level: ☐ Income Range: ☐ Employment Expectation: ☐ Apprenticeship Code: ☐ Leave of Absence: ☐

Employee and Training Code: ☐ Vocational Education: ☐ Transfer Center: ☐ Educational Goal: G8 BAH Basic Skills: ☐ Graduate Credit Approved

From Date: To Date:

Leave of Absence Validation (STVLEAV)

Find %

Code	Description	Activity Date	3rd Part
1	Health Reasons	07-FEB-2008	N
2	Financial Reasons	07-FEB-2008	N
3	Undisclosed Personal Reasons	07-FEB-2008	N
4	Employment Related Reasons	07-FEB-2008	N
5	Maternity	07-FEB-2008	N
6	Sabbatical Year	07-FEB-2008	N
7	Not Known	18-APR-2007	N

To record a Leave of Absence, select the reason for LOA from the dropdown list. Enter the “ from “and “to “dates in the boxes opposite. Save the record by pressing F10 or by clicking the Save icon.

Direct Entry Letter Generation: Open > SGASTDN

File Edit Options Block Item Record Query Tools Help

General Student SGASTDN 8.3X (UU) QuickFlow: RECLOA: 1 of 2

ID: B00512444 Spence, Heather A. Student Summary Term: 200910 View Current/Active Curricula

Learner Curricula Study Path Activities Veteran Comments Academic and Graduation Status, Dual Degree Miscellaneous

Miscellaneous Information

Orientation Session: ☐ Career Plan: ☐ Practical Training: ☐ Education Level: ☐ Income Range: ☐ Employment Expectation: ☐ Apprenticeship Code: ☐ Leave of Absence: 1 Health

Employee and Training Code: ☐ Vocational Education: ☐ Transfer Center: ☐ Educational Goal: G8 BAH Basic Skills: ☐ Graduate Credit Approved

From Date: 01-JAN-2010 To Date: 01-MAR-2010

## Step 2 – Update the Enrolment Status

Exit out of the SGASTDN form. The Quickflow will automatically direct you to SFAREGS. In the Key block, click into the date field to the right of the name and change the current date displayed to the date on which LOA began as recorded on SGASTDN previously.

Move down to the next block and click on the Registration tab, and update the status to the appropriate value ( Please see further information on this below).

The screenshot shows the 'Direct Entry Letter Generation: Open > SFAREGS' window. The 'Registration' tab is selected. In the 'Enrollment Information' section, the 'Status' dropdown is set to 'LF'. A callout box labeled 'Status' points to this dropdown. Other fields include 'Term: 200910', 'ID: 800512444', 'Spence, Heather A.', 'Date: 11-APR-2011', and 'Holds:'. Below this, there are checkboxes for 'View Current/Active Curricula', 'Print Bill', and 'Print Schedule'. The 'Enrollment Information' section also includes 'Process Block', 'Status Date: 11-APR-2011', 'Delete All CRNs', 'Minimum: .000', 'Maximum: 99.990', and 'Acceptance' options: 'Confirmed', 'None' (selected), and 'Accepted'. At the bottom, there is a table with columns: CRN, Subject, Course, Section, Grade Mode, Credit Hours, Bill Hours, Attempted Hours, Status, Status, Level, Appr Recd Override, Part of Term, Instruction, and Campus. The first row shows CRN 10395, Subject ARC, Course 732, Section 0, Grade Mode N, Credit Hours .000, Bill Hours .000, Attempted Hours .000, Status DD, Status UG, Level UG, Appr Recd Override S1, Part of Term S1, Instruction BT, and Campus BT.

The status date will save as the one entered in the Key block and not the current date. Note that the new status and withdrawal date is automatically filtered down so as to update the Course Enrolment Statuses which are used by Finance for fee refund calculation purposes. ( This can be seen in the form SFAREGF ).

Enrolment Status	Student Category
LF	All FT UG and PGCE students. PG students on MSc Innovation Management in the Public Service and PGDip in Legal Practice (Magee)
LC	FT students enrolled on less than 120 module credit points
LZ	All Research Students
LO	All other students including: Study Abroad students Students on validated programmes ( Collaborative Courses Unit ) FT UG Students who are repeating with attendance

## 4.2.13 Recording a Withdrawal

- **QuickFlow: RECWDRL**
- **Forms: SFAREGS, SFAWDRL**

Click on the Record a Withdrawal QuickFlow in the Registry Processing Menu.

### Step 1 – Update the Enrolment Status

The Quickflow will automatically take you to SFAREGS. In the Key block, click into the date field to the right of the name and change the current date displayed to the date of withdrawal i.e. the day the student has left. The date entered in the key block will then filter down and effect the module withdrawal date too.

Move down to the next block and click on the Registration tab, and update the enrolment status to the appropriate value (Please see further information on this below).

**Direct Entry Letter Generation: Open > SFAREGS**

File Edit Options Block Item Record Query Tools Help

Student Course Registration SFAREGS 8.3X (UU) QuickFlow: RECWDRL: 1 of 2

Term: 200910 ID: B00512444 Spence, Heather A. Date: 11-APR-2011 Holds: ☐ ☐

☐ View Current/Active Curricula ☐ Print Bill ☒ Print Schedule

Registration Student Term Curricula Study Path Time Status

**Enrollment Information**

Status: EF Early Leaver - FT UG & PGCE Reason:  Enter a withdrawal status

Process Block:  Date: 11-APR-2011 ☐ Delete All CRNs

Hours Source Acceptance

Minimum: .000 Maximum: 99.990 ☐ Confirmed ☒ None ☐ Accepted

**Course Information**

CRN	Subject	Course	Section	Mode	Grade	Credit Hours	Bill Hours	Attempted Hours	Time Status	Status	Level	Record	Instruction	Campus
18489	ARC	730	1	N		20.000	20.000	.000	.000	RE	UG		S1	BT
10399	ARC	742	0	N		.000	20.000	.000	.000	RE	UG		S2	BT
16986	ARC	734	0	N		10.000	10.000	.000	.000	RE	UG		S1	BT
18393	AAD	718	1	N		40.000	40.000	.000	.000	RE	GT		S12	BT
18837	BMS	101	0	N		20.000	20.000	.000	.000	RE	UG		S2	CE
11183	BMS	828	1	N		30.000	30.000	.000	.000	RE	GT		S2	CE

Notice module status still at RE before the new enrolment status is saved

**Error Flag:**  **Status Type:**

Fees: N - Create collector record Date: 05-APR-2011 Credit Hours: 120.000 Bill Hours: 140.000 CEU Hours: .000

Reason Code; press LIST for valid codes.

Record: 1/1 ... List of Valu... <OSC>

Save the record by pressing F10, or by clicking the Save icon.

Direct Entry Letter Generation: Open > SFAREGS

File Edit Options Block Item Record Query Tools Help

Student Course Registration SFAREGS 8.3X (UU) QuickFlow: RECWDRL: 1 of 2

Term: 200910 ID: B00512444 Spence, Heather A. Date: 11-APR-2011 Holds: ☐ ☐ ☐

☐ View Current/Active Curricula ☐ Print Bill ☒ Print Schedule

Registration Student Term Curricula Study Path Time Status

**Enrollment Information**

Status: EF Early Leaver - FT UG & PGCE Process Block: ☐ Minimum: .000 Maximum: 99.990

Reason: ☐ Status Date: 11-APR-2011 ☐ Delete All CRNs

☐ Confirmed ☒ None ☐ Accepted

**Course Information**

CRN	Subject	Course	Section	Grade Mode	Credit Hours	Bill Hours	Attempted Hours	Time Status Hours	Status	Level	Source	Acceptance
18489	ARC	730	1	N	20.000	20.000	.000	.000	RE	UG		
10399	ARC	742	0	N	.000	20.000	.000	.000	EF	UG	S2	BT
16986	ARC	734	0	N	10.000	10.000	.000	.000	EF	UG	S1	BT
18393	AAD	718	1	N	40.000	40.000	.000	.000	EF	GT	S12	BT
18837	BMS	101	0	N	20.000	20.000	.000	.000	RE	UG	S2	CE
11183	BMS	828	1	N	30.000	30.000	.000	.000	RE	GT	S2	CE

Notice the module status has changed to EF for those modules that have NOT had marks recorded

**Error Flag:** ☐ **Status Type:** ☐

Fees: N - Create collector record Date: 05-APR-2011 Credit Hours: 120.000 Bill Hours: 140.000 CEU Hours: .000

Student registered. Press save to submit print jobs, rollback to return to ID.

Record: 1/1 <OSC>

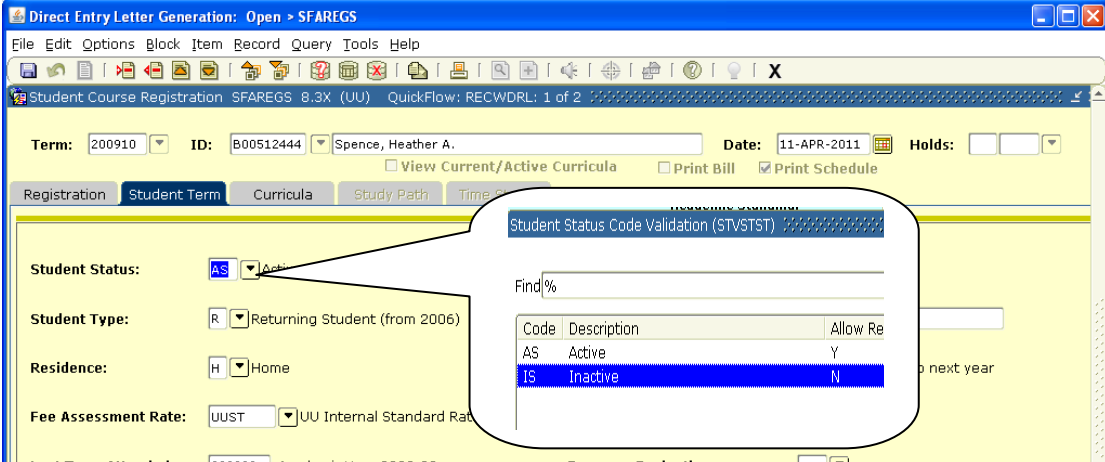
The module status will be updated to the same value as the enrolment status for those modules that have NOT had marks entered. Modules which have had marks entered and rolled to academic history will not have their status updated.

Note that the new status and withdrawal date are automatically filtered down to update the Module Enrolment Statuses (where appropriate) which are used by Finance for fee refund calculation purposes. ( This can be seen in the form SFAREGF ).

Enrolment Status	Student Category
EF	All FT UG and PGCE students. PG students on MSc Innovation Management in the Public Service and PGDip in Legal Practice (Magee)
EC	FT students enrolled on less than 120 module credit points
EZ	All Research Students
EO	All other students including: Study Abroad students Students on validated programmes ( Collaborative Courses Unit ) FT UG Students who are repeating with attendance

## **Step 2– Update the Status from Active to Inactive**

After saving the record in SFAREGS, click on rollback to take you back to the top key block. Perform a next block (ctrl page down) so that the Student Term tab becomes active. Click on the Student Term tab. Update the Student Status from AS (active) to IS (Inactive). Save the record and Exit.



The screenshot shows the SFAREGS application window with the 'Student Term' tab selected. The 'Student Status' dropdown menu is open, displaying a list of status codes. The current status is 'AS' (Active), and the user is selecting 'IS' (Inactive). The dropdown menu also shows 'Find%' and 'Allow Re' columns.

Code	Description	Allow Re
AS	Active	Y
IS	Inactive	N

## **Step 3 – Record the Withdrawal Details**

You will be taken automatically into SFAWDRL.

Enter the student's Banner ID, and the appropriate Term value. Perform a Next Block.

This form displays information about the current student status (taken from SGASTDN ) and the start and end dates for the programme year.

To record the withdrawal, click into the Withdrawal Code field and select the appropriate reason from the list displayed.

**Direct Entry Letter Generation: Open > SFAWDRL**

File Edit Options Block Item Record Query Tools Help

Student Withdrawal SFAWDRL 8.2.1 (UU)

ID: B00512444 Spence, Heather A.

**Withdrawal Status**

Sequence Number: 1

Current Enrollment Status: EF Early Leave PG & PGCE Enrollment Status Date: 12-APR-2011

Withdrawal Code: 03 Personal Effective Withdrawal Date: 12-MAR-2010

Enrollment Start Date: 01-SEP-2009 Enrollment End Date: 31-AUG-2010

Enrollment Break Days: 0 Days In Period: 365

Attendance Break Days: 0 Days Attended: 193 Percent Attended: 52.9

Original Charges: 0.00 Other Costs:

Comment:

FRM-40400: Transaction complete: 1 records applied and saved.  
Record: 1/1 <OSC>

**Withdrawal Status (STVWDRL)**

C...	Desc	...	Activity Da
01	Health Reasons	N	12-SEP-20
02	Financial reasons	N	12-SEP-20
03	Personal reasons	N	06-DEC-20
04	To take up employment	N	12-SEP-20
05	Course unsuitable	N	12-SEP-20
06	Transfer to another UU course	N	12-SEP-20
07	Transfer to other Institution	N	12-SEP-20
08	Unknown Reason	N	30-NOV-20

**Enter Withdrawal Date here**

**Number of days attended**

Move to the Effective Withdrawal Date field and enter the date on which the student is deemed to have ended their studies. Save the record.

This will calculate and populate the days attended both as an actual number of days and a percentage of the year. This information is relevant to fee/refund processing.

#### 4.2.14 Entering Cohort Information (CCU Only)

##### ○ Forms: SFAREGS, SGASADD

You can enter Cohort information for a student by accessing the SGASADD form directly. To do this, you can query back the student in SFAREGS, click on options and select Student Attributes and Cohorts. Alternatively, you can access SGASADD directly by typing the form name in the Go To field. If you do this, please ensure the Banner ID and the Term codes are correct.

Direct Entry Letter Generation: Open > SFAREGS

File Edit Options Block Item Record Query Tools Help

Student: Detailed Student Information [SGASTDN]  
Update Students Term Information  
Student Withdrawal Information [SFIWDRL]  
Update Curriculum  
Term: Student Attributes and Cohorts [SGASADD]  
View Students Schedule of Classes [SFAREGQ]  
Test Score Information [SQATEST]  
Enroll: Charge Optional Registration Fees [SFAEFEE]  
Review Account Detail [TSAAREV]  
Status: Review Students Classes and Charges [SFAREGF]  
Reason: Graduation Application [SHAGAPP]  
Degrees and Awards [SHADEGR]  
Summary Student Information [SGASTDQ]  
Person System Identification [GUASYST]  
Admissions Application Detail [SAAADMS]  
Courses: Define Time Status Rules [SFATMST]  
View Registration Messages

Student A. Date: 11-APR-2011 Holds:

Current/Active Curricula ☐ Print Bill ☒ Print Schedule

Time Status

Process Block: ☐ Minimum: .000 Maximum: 99.990

Accepted: ☐ Confirmed ☒ None ☐ Accepted

CRN	Class	Section	Days	Time	Hours	Attempted Hours	Status	Level	Appr Recd	Override	Part of Term	Method of Instruction	Campus
18489	ARC	730	1	N	20.000	20.000	.000	RE	UG	<input type="checkbox"/>	S1		BT
10399	ARC	742	0	N	.000	20.000	.000	RE	UG	<input type="checkbox"/>	S2		BT
16986	ARC	734	0	N	10.000	10.000	.000	RE	UG	<input type="checkbox"/>	S1		BT
18393	AAD	718	1	N	40.000	40.000	.000	RE	GT	<input type="checkbox"/>	S12		BT
18837	BMS	101	0	N	20.000	20.000	.000	RE	UG	<input type="checkbox"/>	S2		CE
11183	BMS	828	1	N	30.000	30.000	.000	RE	GT	<input type="checkbox"/>	S2		CE

Error Flag: Status Type:

Fees: N - Create collector record Date: 05-APR-2011 Credit Hours: 120.000 Bill Hours: 140.000 CEU Hours: .000

Enrollment Status Code; Press LIST for valid codes, CQUERY for student info.  
Record: 1/1 ... List of Valu... <OSC>

Perform a Next Block and click into the Cohort field. Select the relevant value from the drop down list and press F10 to save.

Direct Entry Letter Generation: Open > SFAREGS - SGASADD

File Edit Options Block Item Record Query Tools Help

Additional Student Information SGASADD 8.3 (UU)

ID: B00512444 Spence, Heather A. Term: 200910

Student Cohort

From Term: 200910 Maintenance To Term: 999999

Cohort Code	Description	Inactive	Reason
FEB09	FEB09	<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

If a student moves from one cohort to another, (because they have taken LOA or been required to repeat a year of study etc ) then the existing cohort value should be ticked as inactive and a reason for this selected. Once this is done, Save the record.

Then move to the next row, select the new cohort and Save again.



## 4.2.15 Applying a Hold (Senior Users Only)

### ○ Form: SOAHOLD

This form is used to enter and maintain holds on a person's record. Different types of *university determined* holds can be created. Effects of such holds, such as preventing a student from registering, having an award conferred etc can also be created.

Holds can be put in place to expire after a set period of time or can be set to end far in the future, but then be ended when they are no longer required. A hold which is active and prevents certain actions may be over-ridden by someone who has the authority and access to the appropriate password.

**Only senior staff will have the authority to place and release holds.**

Access form SOAHOLD. Bring up the student details by entering the Banner ID. Perform a Next Block.

Oracle Developer Forms Runtime - Web: Open > SFAREGS - SOAHOLD

File Edit Options Block Item Record Query Tools Help

Hold Information SOAHOLD 7.3 (DEVL) QuickFlow: RECLQA: 2 of 2

ID: B00663521 Mr Sean Connery

**Hold Details**

Hold Type: SL	Reason: Created by Online enrollment	Release Indicator: E35033
Amount:	From: 05-AUG-2008	To: 31-DEC-2099
Origination Code:		
Hold Type:	Reason:	Release Indicator:
Amount:	From:	To:
Origination Code:		
Hold Type:	Reason:	Release Indicator:
Amount:	From:	To:
Origination Code:		
Hold Type:	Reason:	Release Indicator:
Amount:	From:	To:
Origination Code:		
Hold Type:	Reason:	Release Indicator:
Amount:	From:	To:
Origination Code:		

Hold Type Code, press LIST for valid codes.

Record: 1/1 <OSC>

If any holds are in place, they will show in the Hold Details block. If the ID is unknown, then the search facility can be used as in SPAIDEN to locate and return the correct ID number.

At present, there are 3 types of hold proposed. These could be added to however as we progress through the academic year.

- Fees Hold – this would be applied and maintained by the Finance Department in respect of students who have outstanding tuition fee debts or other finance issues and are not permitted to register.
- Disciplinary Hold – this would be applied and maintained by Registry staff on receipt of information about disciplinary hearing outcomes.
- Graduation / Conferment Hold – this would be applied and maintained by Exams / Registry staff on receipt of information from Finance about tuition fee debtors who are not permitted to have awards conferred.

### To apply a hold

- Click into the Hold Type field and select the type of hold to be applied.

The screenshot shows the SOAHOLD 7.3 (DEV) web form. The main form has a header with 'ID: B00663521' and 'Mr Sean Connery'. Below this is the 'Hold Details' section. It contains several rows of fields for 'Hold Type', 'Amount', 'From', 'To', 'Reason', 'Release Indicator', and 'Origination Code'. The first row is for 'SL' (SLC Information Hold) with 'Reason: Created by Online enrollment'. The second row is for 'CA' (Award Conferment Hold) with 'Reason: Unpaid Resit Fee' and 'Amount: 25.00'. A dropdown menu for 'Hold Type Codes (STVHL00)' is open, showing a list of hold types with their descriptions and release indicators. The 'CA' option is highlighted.

C...	Desc	Reg Hold	Env Hold
CA	Award Conferment Hold	Y	Y
DH	Disciplinary Hold	Y	Y
FI	Finance Hold	Y	Y
OB	Overseas Balance Hold		
SL	SLC Information Hold		
TP	Third Party Sponsor Hold		

- Enter in free text the reason for the hold.
- If release of the hold is to be restricted to the originator, then check the Release Indicator box. This means that only the person whose e code set the hold can release it. Otherwise leave blank.
- If there is an amount of money associated with the hold (e.g. unpaid fee) then enter in the amount box. Otherwise leave blank.
- The date range will default in automatically with a start date of the date entered and an end date in 2099. Amend the end date if known – for example if the hold is for a pre-determined time such as the rest of the academic year. Otherwise leave as set.

- Select the originator from the list available in the Originator Code field. This will normally be faculties, schools and administrative departments rather than individuals.
- Save the record by pressing F10 or by clicking the save icon

If a hold has been applied with a genuine end date, then it will cease to be effective once that date has been reached.

If a hold has been applied with an end date of 2099, then the hold will stay effective until further notice. To end such a hold, the user must change the end date to the current date and save the change.

#### **4.2.16 Applying an Exemption at a Specified Module Level**

##### **○ Form: SHATRNS**

This form is used to record information about exemptions that have been granted to students on the basis of either accredited prior study or APEL. This information will be supplied by academic /faculty staff and will be inputted by Registry. This information will become part of the student's academic history and will be used in determining whether they have achieved the required credits for an award. This information is also held in relation to the programme level, which means different exemption records can be held for UG and PG programmes for the same person if required.

**Use of this form will only be required by those Registry staff who are responsible for entering Exemption information.**

Information can be held in two ways – as either exemption from a named course ( module ) or as exemption from a certain number of credit points as a specified level.

Similar information is held in the current OES system, and it is hoped that those module exemptions currently recorded will be migrated into the Banner system and appear in this form. As credit point exemptions are held in a different format in OES, it will not be possible to migrate them. This information will have to be produced in report form and re-keyed into the new system by staff.

In order to enter exemption information for a student at a certain level ( i.e UG ) for the first time, enter the ID in the Key Block and then enter a 1 in the Transfer Institution Number and Attendance Period Number fields and do a Next Block.

Oracle Developer Forms Runtime - Web: Open > SGASTDN - SHATRNS

File Edit Options Block Item Record Query Tools Help

Transfer Course Information SHATRNS 7.3.3 (TRNG)

ID: B00346048 Dornan, Tonya

Transfer Institution Number: 1

Attendance Period Number: 1

Click into the Institution field and enter the value '10000' for the generic miscellaneous institution. Save the record at this stage.

Oracle Developer Forms Runtime - Web: Open > SGASTDN - SHATRNS

File Edit Options Block Item Record Query Tools Help

Transfer Course Information SHATRNS 7.3.3 (TRNG)

ID: B00346048 Dornan, Tonya

Transfer Institution Number: 1

Attendance Period Number: 1

Transfer Institution

Institution: 10000 Transfer Credit Institution

Transcript Receipt Date: 11-AUG-2008

☐ Official

Perform a Next Block to move to the Transfer Attendance period block. Enter values as follows

Attendance Period – 1

Effective Term – Current term

Level – Level ( UG, GT or GR ) at which the exemption have been granted. If more than one level is involved, then another record will have to be created.

Oracle Developer Forms Runtime - Web: Open > SGASTDN - SHATRNS

File Edit Options Block Item Record Query Tools Help

Transfer Course Information SHATRNS 7.3.3 (TRNG)

ID: B00346048 Dornan, Tonya Transfer Institution Number: 1 Attendance Period Number: 1

**Transfer Institution**

Institution: 10000 Transfer Credit Institution  
 Transcript Receipt Date: 11-AUG-2008  
☐ Official

**Transfer Attendance Period**

Attendance Period: 1  
 Acceptance Date: 11-AUG-2008  
 Effective Term: 200809 Academic Year 2008-09  
 Term Type:  
 Apply to Level: UG Undergraduate  
 Transfer Degree:  
 Attendance Begin Date:  
 Attendance End Date:

Level

No Detail exists for attendance period.  
 Record: 1/1

Save the record at this stage again, by pressing F10, or by clicking the Save icon.

Click on Options, Transfer Course Detail, or alternatively perform a Next Block.

Oracle Developer Forms Runtime - Web: Open > SGASTDN - SHATRNS

File Edit Options Block Item Record Query Tools Help

Options: Institution/Attend Period, Transfer Course Detail, Attendance Period GPA Calc, Transfer Articulation Detail [SHATAEQ]

Transfer Course Information SHATRNS 7.3.3 (TRNG)

ID: B00346048 Dornan, Tonya Transfer Institution Number: 1 Attendance Period Number: 1

**Transfer Institution**

Institution: 10000 Transfer Credit Institution  
 Transcript Receipt Date: 11-AUG-2008  
☐ Official

**Transfer Attendance Period**

Attendance Period: 1  
 Acceptance Date: 11-AUG-2008  
 Effective Term: 200809 Academic Year 2008-09  
 Term Type:  
 Apply to Level: UG Undergraduate  
 Transfer Degree:  
 Attendance Begin Date:  
 Attendance End Date:

Enter a Sequence Number of 1. Then Save the record.

The **Equivalence Course Details** block is where the actual exemptions are entered. Information can be held in two ways – as either exemption from a named course (module) or as exemption from a certain number of credit points as a specified level.

#### 4.2.17 Applying an Exemption for a Named Module

- Tick the Count in GPA box.
- Either enter the module code across the subject and course boxes or use the arrows to perform a search for the subject and then the relevant code. (Note that exemptions are recorded at **module** level only and not at CRN level.)

Sequence Number	Level	Term	Count in GPA	Subject	Course	Hours	Grade	Grading Mode	Repeat	Repeat System	Title
1	UG	200809	<input checked="" type="checkbox"/>								
			<input type="checkbox"/>								
			<input type="checkbox"/>								

Oracle Developer Forms Runtime - Web: Open > SHATRNS

File Edit Options Block Item Record Query Tools Help

Transfer Course Information SHATRNS 7.3.3 (TRNG)

ID: B00346048 Dornan, Tonya Transfer Institution Number: 1

Transfer Course Detail SHATRNS 7.3.3 (TRNG)

Sequence Number: 1  
 Subject:  
 Course Number(s):  
 Hours:  
 Grade:  
 Duplicate:  
 Title:

Existing courses

Find: COM%

Subj	Course	Start	End	Date
COM	001	200607	999999	01-
COM	002	000000	999999	09-
COM	008	000000	999999	09-

Equivalent Course Detail

Sequence Number	Level	Term	Count in GPA	Subject	Course	Hours	Grade	Grading Mode	Repeat	Repeat System	Title
1	UG	200809	<input checked="" type="checkbox"/>	COM							
			<input type="checkbox"/>								
			<input type="checkbox"/>								

- The number of credits associated with the module will default in automatically, as will the title.

Equivalent Course Detail

Sequence Number	Level	Term	Count in GPA	Subject	Course	Hours	Grade	Grading Mode	Repeat	Repeat System	Title
1	UG	200809	<input checked="" type="checkbox"/>	COM	037	15.000					Application Software
			<input type="checkbox"/>								
			<input type="checkbox"/>								

- Enter a Grade of E and a grading mode of E, and then Save the record.
- Perform a Next Block. The levels associated with the module will then display in the bottom block. If more than one displays, delete the ones that are not required by highlighting the row concerned and by clicking the Remove Record icon. Save by pressing F10, or by clicking the Save icon.

Oracle Developer Forms Runtime - Web: Open > SHATRNS

File Edit Options Block Item Record Query Tools Help

Transfer Course Information SHATRNS 7.3.3 (TRNG)

ID: 800346048 Dorman, Tonya Transfer Institution Number: 1

Transfer Course Detail SHATRNS 7.3.3 (TRNG)

Sequence Number: 1  
 Subject:  
 Course Number(s):  
 Hours:  
 Grade:  
 Duplicate:  
 Title:  
 Group:  
 Primary:

Equivalent Course Detail

Sequence Number	Level	Term	Count in GPA	Subject	Course	Hours	Grade	Grading Mode	Repeat	Repeat System	Title
1	UG	200809	<input checked="" type="checkbox"/>	COM	037	15.000	E	E	<input type="checkbox"/>	<input type="checkbox"/>	Application Software

Course Attributes

Attribute Description

A Level A

If more than one module is to be entered, roll back to the Previous Block and then repeat the process again, adding a row below the last.

Oracle Developer Forms Runtime - Web: Open > SHATRNS

File Edit Options Block Item Record Query Tools Help

Transfer Course Information SHATRNS 7.3.3 (TRNG)

ID: 800346048 Dorman, Tonya Transfer Institution Number: 1

Transfer Course Detail SHATRNS 7.3.3 (TRNG)

Sequence Number: 1  
 Subject:  
 Course Number(s):  
 Hours:  
 Grade:  
 Duplicate:  
 Title:  
 Group:  
 Primary:

Equivalent Course Detail

Sequence Number	Level	Term	Count in GPA	Subject	Course	Hours	Grade	Grading Mode	Repeat	Repeat System	Title
1	UG	200809	<input checked="" type="checkbox"/>	COM	037	15.000	E	E	<input type="checkbox"/>	<input type="checkbox"/>	Application Software
1	UG	200809	<input checked="" type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	

Course Attributes

Attribute Description

Subject code; press LIST for codes, CQUERY for existing courses.

Record: 2/2 List of Values <OSC>

#### 4.2.18 Applying a Credit Point Based Exemption

- Tick the Count in GPA box.
- Enter the module code with TCE as the subject and 100 as the course for UG credit points OR TCE as the subject and 200 as the course for PG credit points.



Equivalent Course Detail												
Sequence Number	Level	Term	Count in GPA	Subject	Course	Hours	Grade	Grading Mode	Repeat	Repeat System	Title	
1	UG	200809	<input checked="" type="checkbox"/>	COM	037	15.000	E	E	<input type="checkbox"/>	<input type="checkbox"/>	Application Software	
1	UG	200809	<input checked="" type="checkbox"/>	TCE	100				<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>		

- The credits will default in as 10.00, so change them to whatever number of credits are being recorded at a specific level (e.g. 40.00 if 40 credits at Level 1 are being recorded).
- Enter a grade of E and a grading mode of E.

Equivalent Course Detail												
Sequence Number	Level	Term	Count in GPA	Subject	Course	Hours	Grade	Grading Mode	Repeat	Repeat System	Title	
1	UG	200809	<input checked="" type="checkbox"/>	COM	037	15.000	E	E	<input type="checkbox"/>	<input type="checkbox"/>	Application Software	
1	UG	200809	<input checked="" type="checkbox"/>	TCE	100	40.000	E	E	<input type="checkbox"/>	<input type="checkbox"/>	UG Transfer Credit Exemption	
			<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>		

- Save the record. All potential levels will be displayed in the bottom block.

Equivalent Course Detail												
Sequence Number	Level	Term	Count in GPA	Subject	Course	Hours	Grade	Grading Mode	Repeat	Repeat System	Title	
*	1	UG	<input checked="" type="checkbox"/>	TCE	100	40.000	E	E	<input type="checkbox"/>	<input type="checkbox"/>	UG Transfer Credit Exemption	

Course Attributes	
Attribute	Description
1	Level 1
2	Level 2
3	Level 3

- Perform a Next block and then delete all those levels except the required one. Do this using the Remove Record icon.
- Then Save the record again.

Equivalent Course Detail												
Sequence Number	Level	Term	Count in GPA	Subject	Course	Hours	Grade	Grading Mode	Repeat	Repeat System	Title	
*	1	UG	<input checked="" type="checkbox"/>	TCE	100	40.000	E	E	<input type="checkbox"/>	<input type="checkbox"/>	UG Transfer Credit Exemption	

Course Attributes	
Attribute	Description
1	Level 1

If credits at more than one level are being recorded, then the module TCE100 needs to be entered again and the other credits and level recorded as above. This means that someone with 40 credits at Level 1 and 20 credits at Level 2 will have TCE100 recorded twice with different credits and levels attached i.e.

you can only have 1 Course Attribute row for each Equivalent Course Detail row.

#### **4.2.19 Viewing a Student History**

- Form: SWRCOLL

A new form called SWRCOLL has been developed in house to collect and display various data changes which have been processed elsewhere in a student's record but for which an audit trail is not held elsewhere in Banner.

It is hoped that this form will go some way to replace the useful RPT history form in OES and assist staff in tracking changes in a student's enrolment records during their programme. ( Some additional data items which are held elsewhere in Banner are also replicated here for ease of use by staff when dealing with queries.)

The form runs in query mode and is blank when first entered. To retrieve data for a student, you must enter the ID in the key block or use the searchable fields such as name, date of birth etc to find the one you require. If using these fields to search , then you will have to scroll through the records returned to find the correct one.

If you wish to search for data relating to a specific academic year only, then you can enter this in the key block as well to limit the search. Otherwise data for all years held for the student will be displayed.

The form displays the following information in the top block.

1. Banner ID
2. Academic year
3. Personal details
4. Correspondence address information
5. Phone and e mail information
6. Programme information
7. Current enrolment status
8. Most recent AST code ( progress code )
9. Any programme changes which have been made.

The bottom block of the form displays information on any changes that have been made to the following, and shows when and by whom the change was made.

1. Enrolment status
2. Educational Goal
3. Mode of attendance
4. Study Year
5. AST code

The only field on the form which is updatable is the Comments field in the bottom block, where text may be deleted or additional comments may be added. It is not possible to remove rows from the form if they have been created in error ( i.e where an LOA was applied and then removed a few days later .) In such a case, a note should be made in the Comments field to advise users that the data was entered in error and should be ignored

Where any of the scroll bars are enabled, this means that addition data which does not appear on the screen is available. This form currently operates independently of all other Banner forms and it is not possible to access it from the Options at the top of the screen.

Oracle Developer Forms Runtime - Web: Open > SWRCOLL

File Edit Options Block Item Record Query Tools Help

STUDENT STATUS HISTORY SWRCOLL 1.0 (UU)

ID: 800550564 Term: 200809 Academic Year 2008-09

Program: 2855 BSc Hons Economics DIS FT

Last Name: Truesdale

First Name: Mark

Birth Date: 06-OCT-1987 Class: 2F Year 2, FT

Student Status: AS Active

Level: UG Undergraduate

Campus: JN Jordanstown

College: SS Faculty of Social Sciences

Educ. Goal: I9 BSHDIS

Enrollment Status: ER Expected to Return

AST Code: AST Date: AST Description:

Mobile: Correspondence Phone: 02838334216

Term Code Activity Date Program

200809 16-JUN-2008 2855 BSc Hons Economics

200708 16-JUN-2008 2855 BSc Hons Economics

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Field Name	New Value	Change Date	User	Program Code	Comments
SGRSATT_ATT_S_COT	Y2 Year 2 of Programme	02-JUN-2008	UUDEVL		SGRSATT attribute code changed
SGRSATT_ATT_S_COT	FT MOA Full-time	02-JUN-2008	UUDEVL		SGRSATT attribute code changed
SGBSTDN_EGOL_CC	I9 BSHDIS	02-JUN-2008	UUDEVL		SGBSTDN EGOL CODE changed
SPBETRM_ESTS_COI	ER Expected to Return	02-JUN-2008	UUDEVL		SPBETRM sfbetrm_ests_code changed

## 5 Lists of Values

### 5.1 *List of Enrolment Statuses (ESTS codes)*

The Enrolment Status is the status of the student on a particular programme for a given academic period. (This roughly equates to the OES registration status.)

It is worth noting that there is a proliferation of codes on Banner, for example the leave of absence students are now categorised at either 'FT UG & PGCE' or 'others'.

CD	Conferment Suspended - Debt
DC	Deceased
EA	Exp to Return - Repeat Attend
EC	Early Leaver FT-Less 120 creds
ED	Enrol Suspended-Disciplinary
EF	Early Leaver - FT UG & PGCE
EL	Eligible to Register
EN	Exp to Return-Repeat No Attend
EO	Early Leaver - Others
ER	Expected to Return
ES	Enrolment Suspended - Debt
EZ	Early Leaver - Research
LA	Migration - Unknown ESTS
LC	LOA FT -Less 120 creds
LF	LOA -FT UG & PGCE
LO	LOA - Others
LY	Left Last Year
LZ	LOA - Research
NN	New Non-enroller
NR	Returning Non-enroller
ON	Online Enrolment in Progress
RA	Registered Repeat Attendance
RB	Registered for Bridging
RE	Registered
RI	Registered for Intercalary
RO	Registered for Award Only
RP	Registered for Placement
RT	Research-Resubmit Thesis
RV	Registered as Visiting Student
RW	Research-Writing Up Thesis
RX	Research-Awaiting Examination
RZ	Research -Revise and Resubmit
SL	Successful Leaver
SU	Student Union Sabbatical
SX	Successful Leaver - No Award
UL	Unsuccessful Leaver
XE	Registered for Exams Only

## 5.2 **List of Registration Statuses (RSTS codes)**

Banner registration statuses relate to the status of a module enrolment for a student on a given programme of study and academic year. (This roughly equates to the OES module RUL status.)

In many cases the registration status of the module is set depending on the enrolment status of the student. For example, when a student becomes registered and has an enrolment status of 'RE', all their modules get a registration status of 'RE'.

A	Audit
CD	Collaborative Drop/Delete
DC	Deceased
DD	Drop/Delete
DW	Drop (fee refund rules apply)
EC	Early Leaver FT- Less 120 cred
ED	Enrolment suspended - disciplin
EF	Early leaver - FTUG & PGCE
EO	Early leaver - Others
ES	Enrolment suspended - Debt
LF	LOA (FTUG/PGCE)
LO	LOA Others
LY	Left last year
NN	New non enroller
NR	Returning non enroller
ON	Online Enrolment in Progress
RE	Registered
RN	CW only repeat att
RW	Web registered
SN	2nd Enrol - No Fee
T1	Sem 2 Exam taken in Sem 1
T2	Sem 1 Exam taken in Sem 2
XB	Reg CW & EX only
XE	Reg EX only
XN	Reg CW only

### 5.3 *List of Academic Standing Codes (ASTS codes)*

Banner academic standing codes represent the student 'state' at the end of a period of assessment, say at the end of the academic year. (This roughly equates to the OES RPT codes.)

00	Unknown
A1	SA1 Appeal Successful
A2	SA2 Appeal Successful
A3	SA1 Appeal Unsuccessful
A4	SA2 Appeal Unsuccessful
B1	Successful bridging -intern
B2	Successful bridging - external
B3	Fail bridging course
B4	Withdrawn from bridging course
D1	Resit in current year
D2	First sit in current year
D3	First sit/resit current year
D4	Resit in current year - no fee
D5	Submit PG dissert next year
D6	Resubmit PG dissert current yr
D7	Decision deferred
E5	Progress decision not known
F1	First sit in Semester 2
F2	Proceed to Sem 2 and reverse
L1	Assumed withdrawn at Board
N1	Repeat full year - extenuation
N2	Repeat part year - extenuating
N3	Repeat with attendance
N4	Repeat without attendance
N5	Repeat without attend 1st sit
N6	Resubmit PG dissert next yr
P1	Proceed to next year
P2	Proceed in current year
P3	Proceed with supp work
P4	Proceed with supp work -plcmnt
P5	Proceed higher in next year
P6	Proceed higher in same year
P7	Proceed - no supp award
P8	Proceed - exmpt for supp award
P9	Proceed - Diss in progress
PA	Proceed next semester nursing
PB	Proceed and record CFP
PC	Proceed & record prof award
PD	Proceed higher & prof award
PY	Proceed to same year
S1	Successful completion
S2	Successful completion lower award
S3	Successful completion no award

S4	Successful completion MPhil
SA	Award obtained and prof award
SB	No UU award and prof award
SC	Lower award and prof award
T1	Transfer - good standing
T2	Transfer due to failure
U1	Fail and required to withdraw

#### 5.4 ***List of Hold Values***

Individual student holds, viewable on SOAHOLD.

AH	Award Conferment Hold
AR	AR Hold
BU	Bursary Hold
DD	DD manual instruction
DH	Disciplinary Hold
FH	Faculty Debt
FI	Finance Hold
IT	IT Facilities Hold
NH	New Application Hold
OB	Overseas Balance Hold
PF	Recurring card payment failure
RC	Recurring card payment
RF	Resit Fees Hold
RR	Registration Requirement Hold
SL	SLC Information Hold
TH	Transcript Hold
TP	Third Party Sponsor Hold
UD	Unpaid Direct Debit
UF	Unpaid Fees
UT	Unpaid Third Party debt

## **6 Appendix 1 – Change Admit Term Scenarios**

\*\*\* work in progress \*\*\*



## 7 Change Control

<i>Product Version</i>	<i>Date</i>	<i>Comment</i>
	May 2011	New Lov Section
Banner Student 8.5.1	Jan 2014	Inclusion of Change Control Section
	Jan 2014	Amendment to instructions regarding preferring email indicator
	Jan 2015	Additional advice regarding name changes, legal name to be updated in line with constituent name parts.